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[Continued on next page]

(54) **Title**: METHOD, SYSTEM, AND MEDIUM FOR WORKFLOW MANAGEMENT OF DOCUMENT PROCESSING

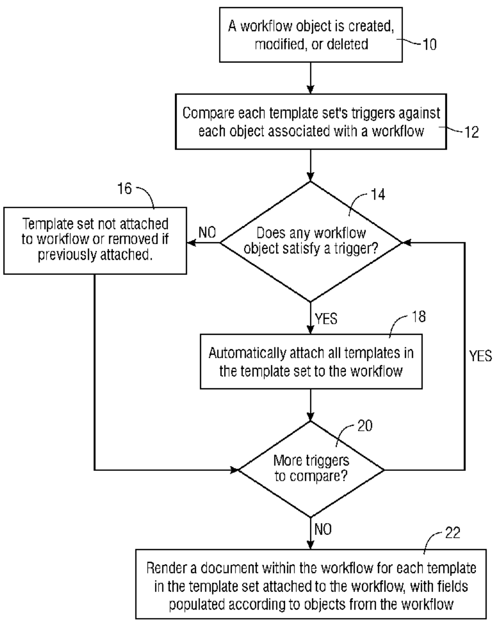

Fig.1

(57) Abstract: A system is provided for workflow management of document processing utilizing one or more objects associated with a workflow, wherein at least one object is imported from an external database. The system creates or edits templates in a template editor utilizing the display device, and stores, in a template, rendering-data received through a builder interface. The system maps to a workflow a template set whose criterion is satisfied by one of the objects associated with the workflow. The system generates a workflow of documents that are each rendered from the stored rendering-data in a template within a template set mapped to the workflow.

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Method, System, and Medium for Workflow Management of Document Processing

This application takes priority from U.S. provisional application 62/028,400, filed on July 24, 2014, and U.S. provisional application 62/017,056, filed on June 25, 2014, which are both incorporated in their entirety herein by reference.

Background

Traditionally, assembling and completing a collection of required medically-related documents (a workflow) has been extremely complicated, time consuming, and inefficient. Bottlenecks often occur when waiting for a particular document in a workflow. For example, a user may not have received all the documents required by an insurance provider that they need to sign. They may have forgotten just a single signature among a multitude of documents that they need to return. Further, users often have to keep recreating the same groups of documents based on certain recurring triggering conditions. For example, a consistent set of documents may be needed when dealing with the same insurance company. Hence, such a recurring condition may require its own unique, but consistent, set of documents. There exists a need for more efficient and accurate document workflow management.

Summary

A computer-implemented method, system, and/or non-transitory computer-readable medium are provided for workflow management of document processing through a user interface utilizing one or more objects associated with a workflow, wherein at least one object is imported from an external database. Templates are created or edited in a template editor utilizing the display device. Rendering-data received through a builder interface is stored in a template. A template set, whose criterion is satisfied by one of the objects associated with a workflow, is mapped to the workflow. A workflow of documents is generated, with each document being rendered from the stored rendering-data in a template within a template set mapped to the workflow.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the workflow comprises a workstate whose initiation requires the completion of another workstate, each workstate comprises a task whose initiation requires the completion of another task, and a team is assigned to each workstate. Each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member, with at least one team member being selected among a plurality of users having such role.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the workflow comprises a workstate whose initiation requires the completion of another workstate, each workstate comprises a task whose initiation requires the completion of another task, and a team is assigned to each workstate. Each team can comprise a plurality of roles, with each task corresponding to a role that corresponds to a team member, with at least one team member being selected among a plurality of users having such role, and may also include each task, step, and workstate having a deadline, wherein each team member receives a notification when a threshold amount of time, prior to their task's deadline, is exceeded and a subsequent notification when the deadline elapses. Each step can be completed when the last incomplete constituent task is completed, with each workstate being completed when the last incomplete constituent step is completed, and with the workflow is completed with the last incomplete workstate is completed.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the criterion can further comprise an object trigger condition that attaches a template set to a workflow. Trigger conditions can comprise insurance provider object trigger options for a specified insurance provider object or any insurance provider object associated with the workflow, or a diagnosis object trigger option, or item object trigger options comprising an item object code trigger, an item object name trigger, and an item object manufacturer trigger.

In other embodiments, the computer-implemented method, system, and/or non-transitory computer-readable medium includes managing the template sets to which a template is assigned.

In some variations, the computer-implemented method, system, and/or non-transitory computer-readable medium also comprises rendering one or more documents, each being rendered based upon the same selected template and being attached to the same workflow.

Variations of the computer-implemented method, system, and/or non-transitory computer-readable medium can comprise rendering one or more documents, each being based upon the same selected template and attached to the same workflow, based on displayed options. Display options can comprise rendering a document with a list of all insurance provider objects associated with the workflow, rendering a document for each insurance provider object selected from among those associated with the workflow. Each generated document contains information regarding its associated insurance provider object, and rendering a document for each insurance provider object associated with the workflow, wherein each generated document contains information regarding its associated insurance provider object.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template editor further comprises assigning or removing a template with respect to a template set based on object options comprising objects not being applicable, any objects, and only selected objects, as well as code object options to use a template for all code objects, to use only specified code objects, and an option to exclude code objects entirely. The template editor further comprises displaying options to upload a template and to initialize or edit each of a template's properties, comprising template title, field default font size, page counter location, recipient instructions text field, a fax cover sheet flag, and a compliance document flag.

Other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium render documents containing item object codes for all item objects associated with the instant workflow, all item objects whose codes are specified, or all item objects except those whose codes are specified as being excluded. Documents method can also be attached to the instant workflow which are rendered based upon the same selected template associated with the instant workflow.

In other embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template builder interface displays an editable template with a listing of selectable input field templates and receives input designating a location within the template for a selected input field template. The template builder interface can also render a document, based upon the edited template, having an input field located thereon according to the received position information.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template builder interface displays a selected editable template with a listing of selectable input field templates and receives input dragging and sizing a selected field template onto a pixel-defined location within the editable template. The template builder interface can also display editable field property options comprising a required-field flag, a flag to propagate the field template to subsequent pages upon rendering, a specified default value, a specified comparison value, an encryption option, and a specified number of fields over which to split the instant field over upon rendering. The template builder interface may also display a preview version of the editable template, wherein each associated field template is displayed according to its respective specified pixel position and specified field properties, and render a document, based on the template, having an input field located thereon according to the received input.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template editor displays options to assign and remove a template with respect to a template set and options to create and edit a template.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template editor displays options to toggle template visibility, to indicate a template is a favorite, and to clone a template by requiring a different title.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template editor further comprises a customizable checklist designating which fields in a rendered document require completion prior to the rendered document being designated as complete.

In other embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface displays options for downloading, secure-sending electronic transmission, and faxing a rendered document.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template builder interface displays a notification in a rendered document when an object value does not match any values in a list of comparison values in a field in the template.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template builder interface outputs an item object listing within a rendered document, with any item objects exceeding a quantity threshold for a page being rendered on a subsequent page of the rendered document.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the template builder interface further comprises an editable field property flag that auto-copies a value entered into a field rendered across all supplemental pages in a rendered document.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface receives input delegating each document template in a workflow to one or more different users, which removes the workflow from the user's interface until at least one delegated document template is returned or cancelled.

In other embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface further comprises a profit analyzer interface that displays a profit index calculated by dividing a received positive item allowance amount by a received positive item cost amount.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface displays an object imported from an outside database as a selectable pre-generated object.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, a template can be manually associated with a workflow.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, a field may be displayed in the rendered document only if a recipient account is of a role type matching a role type specified by the recipient options within the field's recipient options.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, a change in data associated with a field propagates the field's data by causing an automatic re-rendering of all documents in the same workflow utilizing the field.

In other embodiments, the computer-implemented method, system, and/or non-transitory computer-readable medium comprises a signature input field that includes options to type and draw a signature, an option indicating the signer is authorized to sign, and an option indicating the client cannot sign with a field receiving the signer's name and relationship to the client and a field receiving a reason the client cannot sign.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the quantity of pages in a rendered document corresponds to the quantity of item objects rendered in the rendered document.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, rendered documents are dynamically replicated into the workflow based on each different value of an object type within a workflow, each rendered document reflecting its respective value of the object type.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, rendered documents are delegated within a user account to selected user accounts associated with the user account, each selected user account being assigned to complete at least one delegated rendered document.

In other embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, rendered documents are delegated within a user account to selected user accounts associated with the user account, with each selected user account being assigned to complete at least one delegated rendered document. Upon completion of an assigned rendered document, the user interface presents append and replace options for the completed document.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the workflow utilizes a work-in-progress comprising tasks to be completed, documents to be completed, appointments to be completed, role assigned to each task, deadline to complete each task, and the next work-in-progress state.

In variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface presents a graphical dashboard interface of all workflows associated with a user account.

In some embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface removes a task associated with a user's account when the user has delegated all portions of the task to other users or groups within an organization to which the user account belongs.

In other variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface provides an option that hides a client's last name in all documentation associated with an organization.

In other embodiments of the computer-implemented method, system, and/or non-transitory computer-readable medium, the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set. A document from the attached template set, once rendered, displays fields pre-populated with data from an object associated with the object trigger condition.

In some variations of the computer-implemented method, system, and/or non-transitory computer-readable medium, the user interface further presents administrative options, for user accounts and fax numbers, comprising add, edit, update, and delete, with respect to both a company's account and to each of the company's plurality of branch locations.

A document rendering computer-implemented method, system, and/or non-transitory computer-readable medium utilizing a template builder interface on a display device comprises displaying a listing of selectable input field templates in an editable template, displaying a thumbnail version of each template page, and subsequently receiving input dragging and sizing a selected field template onto the editable template, with the field template location corresponding to editable location values within the editable template. Editable field properties are displayed comprising a required-field flag, a flag to propagate both the field template and its received data to subsequent pages upon rendering, a default value, and a comparison value. Subsequently, a preview version of the editable template is displayed, wherein each associated field template is displayed according to its respective specified location values and its field property values. Subsequently a document is rendered on the display device, based on the template, with an input field located on the rendered document according to the specified location values.

In variations of the document rendering computer-implemented method, system, and/or non-transitory computer-readable medium utilizing the template builder interface, options for a currently selected field template include dragging, resizing, copying, deleting, field character limit, mandatory default value, optional default value, an encryption option, measurement unit types comprising weight measurement units, time measurement units, and size units comprising length, width, and height measurement units. More options include specifying a field type that comprises a text field, a drop-down list that utilizes input in a delimited document, a numeric split value that specifies a number of fields over which to split the instant field between upon rendering. Further options include selecting a recipient role comprising clinician, vendor, physician, and client.

Those skilled in the art will realize that this invention is capable of embodiments that are different from those shown and that details of the devices, media and methods can be changed in various manners without departing from the scope of this invention. Accordingly, the drawings and descriptions are to be regarded as including such equivalent embodiments as do not depart from the spirit and scope of this invention.

Brief Description of Drawings

For a more complete understanding and appreciation of this invention, and its many advantages, reference will be made to the following detailed description taken in conjunction with the accompanying drawings.

FIG. **1** is a flowchart illustrating workflow modification based on objects.

FIG. **2** is a screenshot of an account login interface.

FIG. **3** is a screenshot depicting an account creation interface.

FIG. **4** is a screenshot depicting a login credentials creation interface.

FIG. **5** is a screenshot of a Terms of Use acceptance interface.

FIG. **6** is a screenshot of a password retrieval interface.

FIG. **7** is a screenshot depicting a home interface.

FIG. **8** is a screenshot continuing a depiction of the home interface.

FIG. **9** is a screenshot continuing a depiction of the home interface with a date selection option.

FIG. **10** is a screenshot showing a support request interface.

FIG. **11** is a screenshot of a profile interface.

FIG. **12** is a screenshot of a password change interface.

FIG. **13** is a screenshot of an email address management interface.

FIG. **14** is a screenshot of adding an email address in the email address management interface.

FIG. **15** is a screenshot of a fax preference management interface.

FIG. **16** is a screenshot depicting access to an external data source for client information.

FIG. **17** is a screenshot of a user management interface.

FIG. **18** is a screenshot of a user being added in the user management interface.

FIG. **19** is a screenshot of a branch user permissions interface.

FIG. **20** is a screenshot of a branch management interface.

FIG. **21** is a screenshot of a specified branch in the branch management interface.

FIG. **22** is a screenshot of a company management interface.

FIG. **23** is a screenshot of an administration interface.

FIG. **24** is a screenshot of a logo management interface.

FIG. **25** is a screenshot of a fax number management interface.

FIG. **26** is a screenshot of a fax number permissions management interface.

FIG. **27** is a screenshot of a client creation interface.

FIG. **28** is a further screenshot of the client creation interface.

FIG. **29** is a screenshot of a workflow object creation interface depicting confirmation of client information.

FIG. **30** is a screenshot depicting a client notes interface.

FIG. **31** is a screenshot depicting a client audit interface.

FIG. **32** is a screenshot of a workflow object creation interface depicting diagnosis, insurance, and previous equipment interfaces.

FIG. **33** is a screenshot depicting the previous equipment creation interface.

FIG. **34** is a screenshot depicting text being imported into a customized comment field.

FIG. **35** is a screenshot of a customized comment text field being updated.

FIG. **36** is a screenshot of a workflow object creation interface.

FIG. **37** is a screenshot depicting an equipment item with an accompanying customized comment text field.

FIG. **38** is a screenshot depicting a text template with a different client's information applied to placeholders.

FIG. **39** is a screenshot depicting a workflow notes interface.

FIG. **40** is a screenshot depicting utilizing options in a workflow notes interface.

FIG. **41** is a screenshot depicting a pop-out version of a workflow notes interface.

FIG. **42** is a screenshot of a workflow messaging interface.

FIG. **43** is a screenshot of a workflow object creation interface with options to add a physician and create a new workflow.

FIG. **44** is a screenshot of a workflow object creation interface with physician search options.

FIG. **45** is a screenshot of a workflow object creation interface with physician creation options.

FIG. **46** is a screenshot depicting a client information interface.

FIG. **47** is a screenshot of a change in workflow status.

FIG. **48** is a screenshot further depicting a client information interface with diagnosis, insurance, and clinician options.

FIG. **49** is a screenshot further depicting a client information interface with clinician and physician options.

FIG. **50** is a screenshot further depicting a client information interface with physician, vendor, and evaluation participant options.

FIG. **51** is a screenshot further depicting a client information interface with vendor, and evaluation participant options.

FIG. **52** is a screenshot depicting an item information interface.

FIG. **53** is a screenshot depicting an item adding interface.

FIG. **54** is a screenshot of items being appended to an item kit in an item adding interface.

FIG. **55** is a screenshot depicting the creation of a new item kit within an item adding interface.

FIG. **56** is a screenshot depicting a profit analysis interface.

FIG. **57** is a screenshot depicting a company options modification interface.

FIG. **58** is a screenshot depicting a client information final review interface with evaluation date, client information, and diagnosis data options.

FIG. **59** is a screenshot further depicting a client information final review interface with insurance, subject, primary item, and item list options.

FIG. **60** is a screenshot further depicting a client information final review interface with primary equipment item category selection options and clinician options.

FIG. **61** is a screenshot further depicting a client information final review interface with primary equipment item model selection options and clinician options.

FIG. **62** is a screenshot further depicting a client information final review interface with primary item, item list, and clinician options.

FIG. **63** is a screenshot depicting an interface to edit a primary item.

FIG. **64** is a screenshot depicting an interface to add an item.

FIG. **65** is a screenshot depicting a quick-add interface for a new item.

FIG. **66** is a screenshot further depicting a client information final review interface with physician, vendor, and evaluation participant options.

FIG. **67** is a screenshot depicting a workflow template management interface.

FIG. **68** is a screenshot further depicting a template management interface with a team note displayed.

FIG. **69** is a screenshot depicting a template status history interface.

FIG. **70** is a screenshot depicting a template QA interface.

FIG. **71** is a screenshot depicting a rendered template preview interface.

FIG. **72** is a screenshot depicting a template editing interface.

FIG. **73** is a screenshot depicting a signature field management interface.

FIG. **74** is a screenshot further depicting a template editing interface.

FIG. **75** is a screenshot further depicting a template management interface.

FIG. **76** is a screenshot depicting a template preview interface.

FIG. **77** is a flowchart for a template builder interface.

FIG. **78** is a screenshot depicting a template builder interface.

FIG. **79** is a screenshot further depicting a template builder interface with active field options.

FIG. **80** is a screenshot further depicting a template builder interface with field properties.

FIG. **81** is a screenshot further depicting a template builder interface with more field properties.

FIG. **82** is a screenshot depicting a template field preview interface.

FIG. **83** is a screenshot depicting a secure send interface.

FIG. **84** is a screenshot depicting an email received via secure send.

FIG. **85** is a screenshot depicting a send fax interface.

FIG. **86** is a screenshot further depicting a workflow template management interface with updated template request and fax request data.

FIG. **87** is a screenshot depicting a signed template copy upload interface.

FIG. **88** is a screenshot depicting a deleted items interface.

FIG. **89** is a screenshot depicting a My Database interface.

FIG. **90** is a flowchart for a template editor interface.

FIG. **91** is a screenshot depicting a template listing management interface.

FIG. **92** is a screenshot depicting a template management interface.

FIG. **93** is a screenshot depicting an add template interface.

FIG. **94** is a flowchart for a template set interface.

FIG. **95** is a screenshot depicting a template set listing management interface.

FIG. **96** is a screenshot depicting an add template set interface.

FIG. **97** is a screenshot depicting a template set management interface.

FIG. **98** is a screenshot depicting an insurance trigger interface.

FIG. **99** is a screenshot depicting a diagnosis trigger interface.

FIG. **100** is a screenshot depicting an item trigger interface.

FIG. **101** is a screenshot further depicting a template set management interface.

FIG. **102** is a screenshot depicting a global item listing management interface.

FIG. **103** is a screenshot depicting an item management interface.

FIG. **104** is a screenshot further depicting an item management interface.

FIG. **105** is a screenshot depicting an item kit management interface.

FIG. **106** is a screenshot depicting a diagnosis management interface.

FIG. **107** is a screenshot depicting a diagnosis record audit interface.

FIG. **108** is a screenshot depicting an insurance provider management interface.

FIG. **109** is a screenshot depicting an insurance provider audit interface.

FIG. **110** is a screenshot depicting a resource search interface.

FIG. **111** is a screenshot depicting a resource search results interface.

FIG. **112** is a screenshot depicting a resource management interface.

FIG. **113** is a screenshot depicting a resource creation interface.

FIG. **114** is a screenshot depicting a workflow note management interface.

FIG. **115** is a screenshot depicting a vendor accounts listing management interface.

FIG. **116** is a screenshot depicting an add vendor interface.

FIG. **117** is a screenshot depicting a previous item comment management interface.

FIG. **118** is a screenshot depicting a letter closing text management interface.

FIG. **119** is a screenshot depicting an attestation text management interface.

FIG. **120** is a screenshot depicting a client search interface.

FIG. **121** is a screenshot further depicting the home interface utilizing a client search.

FIG. **122** is a screenshot depicting an inbox interface.

FIG. **123** is a screenshot depicting a workflow management interface.

FIG. **124** is an illustration depicting workstates, steps, tasks, and timing within a workflow.

FIG. **125** is an illustration depicting QA item status review interface for a workstate.

FIG. **126** is an illustration depicting a workstate change interface.

FIG. **127** is an illustration depicting a change in workstate ownership.

FIG. **128** is an illustration depicting QA item status review for a workstate with elevated privileges.

FIG. **129** is an illustration depicting a workstate change with elevated privileges.

FIG. **130** is an illustration depicting a change in workstate ownership with elevated privileges.

FIG. **131** is an illustration depicting an element view of a workflow.

FIG. **132** is an illustration depicting a workstate view of a workflow with expanded workstates.

FIG. **133** is an illustration depicting a workstate view of a workflow with collapsed workstates.

FIG. **134** is an illustration depicting a workstate history view of a workflow.

FIG. **135** is an illustration depicting a document search interface.

FIG. **136** is an illustration depicting a document search interface with document records.

FIG. **137** is an illustration depicting a document search interface with advanced search options.

FIG. **138** is an illustration depicting a document search interface with additional advanced search options.

FIG. **139** is an illustration depicting an alternate embodiment of a document search interface with document records.

FIG. **140** is a block diagram of an embodiment of a computer system that can function in one or more embodiments disclosed herein.

FIG. **141** is a block diagram of an exemplary computing network that can function in one or more of the embodiments described herein.

Detailed Description

Referring to the drawings, some of the reference numerals are used to designate the same or corresponding parts through several of the embodiments and figures shown and described. Corresponding parts are denoted in different embodiments with the addition of lowercase letters. Variations of corresponding parts in form or function that are depicted in the figures are described. It will be understood that variations in the embodiments can generally be interchanged without deviating from the invention.

A collection of documents, also known as a workflow, is often needed in the context of medical care, medical/rehab equipment, and insurance billing. As used herein, the terms document set and template set can all be used interchangeably. Similarly, the term form builder can be used interchangeably with the term template builder. Workflow management relates to, among other things, the creation, modification, quality control, assignment and tracking of rendered documents, templates, and the collections to which each template belongs. Workflow management can also relate to arranging documents in order of priority (for example, among multiple/chained-dependencies among documents, among users, or both) and/or sorting of documents. The templates needed for a workflow may depend on a variety of factors, for example a diagnosis, the type of equipment, or the one or more insurance companies involved. FIG. **1** provides, for embodiments, a high-level overview of aspects of workflow management, as will be discussed in more detail below. As part of a workflow, objects associated with the workflow (such as clients, equipment items, diagnoses, insurers, etc.) can be created, modified, deleted, or imported **10**. Once workflow objects are complete (or modified), they are compared to triggers belong to different template sets **12**. If none of a template set's trigger's criteria are met **14**, then the template set may not be added to the workflow **16**. Similarly, if a trigger's criteria are no longer met by a template set within the workflow **14**, then the template set (and rendered documents based thereon) may be removed **16** from the workflow. If, however, a workflow object satisfies one of a template set's triggers' criteria **14**, that template set can then be added/appended to the instant workflow **18**. Similarly, if an update to a workflow object subsequently makes it a match for a trigger's criterion **14**, then the template set with which the trigger(s) is/are associated can be added/appended to the workflow **18**. This is performed until all (or specified) triggers have been compared with workflow objects **20**. Either automatically or on-demand, some or all templates associated with the workflow can be rendered into documents, utilizing data from the workflow's objects **22**. In some embodiments, a template may not belong to any template sets, or alternatively it may belong to multiple template sets. Additionally, template sets may be utilized for any number of workflows. In some embodiments, each template can have its own trigger(s), irrespective of whether such template belongs to any template sets. A template, therefore, may be added to a workflow without belong to a template set.

In some embodiments, online accounts must first be generated for users, wherein the account types can include, for example, clinicians, Rehab Technology Suppliers (or RTS, hereinafter 'vendors'), physicians, and clients. A user can be any individual utilizing any interface described herein. Clinician users can utilize clinician-type accounts, vendor users can utilize vendor-type accounts, physician users can utilize physician-type accounts, and client users can utilize client-type accounts, for example. Once generated, online accounts can use any appropriate method for online authentication including, but not limited to, password(s), biometric authentication(s), periodically/randomly-generated PIN(s), CAPTCHA(s), and/or RE-CAPTCHA(s). The instant embodiment employs an automatic logout after a period of inactivity. Some embodiments utilize a definable timeout period. Other embodiments do not utilize an automatic logout feature. FIG. **2** depicts an embodiment of an interface having required fields for a username **50** and a password **52** for authentication. In the instant embodiment, any field described herein, including password fields, can optionally utilize input obfuscation (such as dots) instead of the actual input. Any field described herein that displays previously entered input can optionally display obfuscate stored text (such as dots) when retrieved, whereas other embodiments may not employ such obfuscation. Any field described throughout can be a required field, wherein received input is not complete until the input conforms to the requirements of the input field. Additionally, any interface can utilize an add option to add new data, whether a single field or a collection of fields. Some embodiments may require certain fields to be completed prior an add option being selectable. In other embodiments, an add option can be selectable without conditions on its accessibility.

The interface also presents password retrieval options **53**, as discussed below with respect to FIG. **6**. The interface further presents an option to unlock a user account **66**. In some embodiments, a user can become locked out of their account after a threshold number of unsuccessful login attempts. In some embodiments, an administrator can set such a lockout threshold. In other embodiments, the user can set such a lockout threshold for their own account. The interface further includes a top view option **68** that when selected returns to the top of the interface screen, where any interface screen can utilize such view options. Other embodiments can include options to return to the bottom, left, or right of an interface screen.

Although FIG. **2** and subsequent figures depict asterisks to denote required fields, any notation can be utilized. In some embodiments, required fields need not be visibly denoted at all. Any field described herein can be a required field. Any field described throughout can have any appropriate validation conditions, such as requiring a maximum/minimum of letters/numbers/special-characters/upper-case/lower-case or total characters, requiring certain characters (*e.g.,* requiring an '@' symbol for input received in email address fields), formatting requirements (*e.g.,* requiring XX/XX/XXXX or XX-XX-XX for input received in date fields). Any appropriate type of field validation technique can be utilized in various embodiments.

Any account login interface described herein can optionally utilize a role-selection field (not shown) as well, which allows a user to specify whether they have a clinician, vendor, physician, or client account, for example. Activities involving protected client data require a secure online account, and secure data transmission, to comply with The Health Insurance Portability and Accountability Act of 1996 (HIPAA). To achieve HIPAA compliance, all account types provide secure data storage and transmission. However, many aspects described herein do not utilize such client information, and therefore those aspects can utilize any manner of transmittal and/or notification, including (but not limited to) unsecured email, text message, internet/IP-based messaging, phone call, pager, etc. (all are hereinafter designated as a notification). Therefore, users of each account type are required to utilize their secure online account for aspects that involve protected client data, but not necessarily for other aspects herein. Therefore, no element or limitation should be construed as requiring the utilization of a secure online account, or secure data transmission, unless it utilizes client data protected under HIPAA. In some embodiments, any text field can utilize a text-clearing option whereby a user can clear any text currently in the text field, regardless of whether the text was entered by the user or pre-populated. The interface can also present account-creation options **54**, which can include links register respective account types, here shown as clinician, vendor, physician, and client. However, any other type of user account is possible and is in no way limited to these specific account types or to only such associated functionality.

FIG. **3** depicts account creation after the interface receives input for a physician account-creation option **54** (from FIG. **2**), although the following can apply to any account type. User information **56** can be requested through input fields that can include name, credential/title, license #, clientele type (pediatric, adult, geriatric, etc.), gender, and experience level. Workplace/contact information **58** can include organization name, phone/fax number, street address, and city, for example. Any provided information can be utilized in workflows as discussed below.

FIG. **4** continues with the account creation depicted in the instant embodiment. Workplace/contact information **58** can further include county, state, zip/postal code, and country, for example. The interface can also utilize an option to omit a client's last name **60**. The interface also receives a user email address **50** that can serve as the username, and also receives a password **52**, both of which can be required to be typed multiple times to confirm accuracy. Additionally, the interface can process optional promotional codes **62** entered by the user, and present a selectable completion indicator **63**. FIG. **5** continues with the account creation depicted in the instant embodiment. The interface can require a user to accept terms and conditions **64** and utilize an acceptance confirmation indicator **67**.

In some embodiments, when a user forgets their password, they can utilize a password retrieval interface. FIG. **6** depicts an exemplary password retrieval interface, requesting the user's email address **50** and a password retrieval option **51**. Although FIG. **6** depicts the user's email being used to receive a temporary password, other embodiments can utilize any authentication technique (or combination thereof) discussed above in FIG. **2** with respect to account authentication. In some embodiments, other identifying information associated with a user account, such as a user name, can also be utilized. Returning to FIG. **2**, a security warning **66** discloses an account locking feature wherein a certain number of incorrect login attempts will lock the account associated with the user name. In some embodiments any number of incorrect attempts can be utilized as the account-locking threshold. Some embodiments present this threshold lockout number as an option definable by the account holder or other users.

FIG. **7** depicts a home interface used in some embodiments to manage workflows associated with an account. The interface displays heading links **100** (each discussed in detail below) that can provide quick access to the home interface, to an inbox interface, to a workflow management interface, to a clients interface (whose options are shown in FIGS. **7-8** for client creation and FIG. **122** for client search), to a My Database interface, and to a deleted items interface. Other links can be displayed in other embodiments. In some embodiments, the heading links **100** are visible in every interface screen disclosed herein. The home interface can display a username **102**, which in various embodiments can be displayed as a custom-created name, a first name, last name, a title, any other identifier, and/or any combination thereof. The home interface also provides a logout option **104**. The home interface further provides administrative options that, in some embodiments, are selectable in any interface screen disclosed herein. Administrative options can include a home option **105** that returns the user to the instant interface. Administrative options can also include a branch administration option **106**, a profile management option **108**, and a support option **110**.

The home interface further provides the user with options to search for workflows by various criteria, including a client's name **112** and workflow status **114** (*e.g.*, new assessment, in progress, submitted, printed to fax, accepted, rejected completed, downloaded, overdue, and cancelled). Any text field described herein can utilize any type of suitable search technique, such as searching existing records according to a received portion of a name, a partial description, or a partial number. Additionally, a user can also search for client accounts from BRIGHTREE® or any other suitable data sources or external databases, which may require separate authentication, as depicted in FIG. **16**.

Returning to FIG. **7**, in some embodiments, the user can then import the client information from the data source. Any field described herein can utilize a 'Clear Selection' **116** option (or any other suitable name) to remove any contents within a field. The home interface includes an 'Advanced Search' **117** set of option, which in the present embodiment reveals more search options discussed below. In other embodiments, some, all, or other options can be always visible. Additionally, any interface described herein can utilize an Advanced Search **117** type of option to hide/reveal fields or other data. Search options can also include clinician name **122**. The interface in some embodiments can also display recent workflows **120** associated with the account, such as recently created and/or edited workflows. A recent workflow listing **120** can include a date/time-stamp, a link to the workflow, and a description and/or link to an equipment item associated with the workflow. Additionally, it can include a link to the client **118**, which can lead to a listing of all of the client's workflows.

In FIG. **8**, the home interface further includes workflow search options that include physician name **124**, vendor name (not shown), workflow type **126** (*e.g.*, basic order, complex rehab workflow, general document workflow, seating and evaluation, specification sheet), date needed range **130**, and user **132**. The date needed range **130**, or any other field, can utilize any suitable date-specification interface, as one embodiment depicts in **148** of FIG. **9**. The home interface can present a search option **129** to search by any criteria specified above with respect to FIGS. **7-8**.

Returning to FIG. **8**, a user can also search workflows according to associated users **132**. For example, other users at a branch location may be associated with the instant account and/or the workflow. The interface can also include an option to browse all recent workflows **144**. The interface can further include a notifications section, wherein notifications associated with the account can be displayed. Notification can include workflow update notifications, wherein a notification can be provided whenever another user, who has been delegated a task (such as completing forms specified by the instant user) completes such a task, or performs any action that warrants a status update regarding that delegated task. As discussed in detail below with respect to FIGS. **83-87**, users can send template documents to other users (such as with secure send and/or fax options), and thereby delegate (and re-delegate as necessary) tasks, such as completion of template documents that they receive.

The notifications section in FIG. **8** can include an option to select/de-select all notifications **134**. Any selectable listing can include such a select/de-select all option. The notifications section can include an option to view all notifications **136**. Each notification listing **138** may display a date/time-stamp **170** and can utilize a selectable field, such as a checkbox, that can be utilized with a notification option **140** and include options such as deleting selected notifications. A notification listing **138** can also utilize an option to create a new client **142**, although such an option can be utilized anywhere else in various embodiments. Creating a new client **142** can also initialize a new workflow. Additionally, some embodiments may include options to sort notifications by various criteria, such as date/time-stamp, notification name, account-type, and/or the names of users having various account types. Any interface screen, including the home interface screen, can provide notice options **150** to view, for example, terms of use, privacy policy, and HIPAA statement materials.

FIG. **10** illustrates a contact interface for a user to receive support, which corresponds to the support option **110** in FIG. **7**. A user can select a category **152** and type in a comments field **152**. In other embodiments, the user can create a custom category. The contact interface also provides a cancel option **156**, which returns the user to the previous screen. In other embodiments, a cancel option **156** can return the user to any specified interface described herein. Any interface described herein can utilize a cancel or similar option wherein changes are not committed. In some embodiments, a pop-up or other notification will seek confirmation prior to performing such a cancel option, which can include notification that changes made will not be saved.

FIG. **11** depicts a profile interface that can correspond with the profile management option **108** in FIG. **7**, displaying options to update the user's information **158**, change their password **160**, manage their email addresses **162**, manage fax preferences **164**, and manage data sources **166**. Additionally, the user can view fax preference information **168** which can include a fax number, fax name, and also a managing fax preferences option **164**. The profile interface also displays timestamps **170**, such as when the account was registered and the last login time. Timestamps can be displayed and/or used for calculations/queries and can be displayed in any appropriate temporal units for any activity. Timestamps can also be utilized for any interface described herein. Options are also presented, for example, to select the admin option **180**, user management option **182**, and fax number management option **184**. Any usage of the term "fax" herein can include e-fax technology, which is readily known in the art as utilizing internet-based protocols and does not warrant further discussion.

Selecting the option to update user information **158** can bring up the account creation interface discussed above with respect to FIGS. **3-4**. In some embodiments, the fields are pre-populated with the account's current information, although not all the fields in those figures need be utilized. Additional fields not depicted in FIGS. **3-4** can be utilized as well.

Returning to FIG. **11**, selecting the password change option **160** brings up a password modification interface illustrated in FIG. **12**. The exemplary interface in FIG. **12** can utilize an updated user password **53** and a password update confirmation indicator **55**. Selecting the email address management option **162** in FIG. **11** can bring up the email address management interface in FIGS. **13-14**. In FIG. **13**, an email address and its type (*e.g.*, primary, secondary, etc.) are displayed, along with options to add one or more additional email addresses **172**. FIG. **14** depicts the email address management interface with an additional email address input field **173** associated with the account as well as an email management confirmation indicator **174**.

Returning to FIG. **11**, selecting the manage fax preferences option **164** brings up the interface depicted in FIG. **15**. As part of the listed fax preference information **168**, the user can select an option to receive email alerts **175** when a fax is received at the listed fax number. The user can also select an option to receive notifications **176** when a fax is received at the listed fax number. Other embodiments include any other type of alert, including but not limited to text message, internet/IP-based messaging, phone call, pager, etc. Any alert or email based upon a received fax can attach a copy of the received fax, which may optionally include a text version derived from optical character recognition. Embodiments can use image files that contain at least some selectable text within an image file based on optical character recognition. Other options may include compressed and/or thumbnail versions of the received fax, or only a subset of the pages in the received fax. Additionally, the user can designate which fax number is designated as the default outbound fax number **177** when a fax is received at the listed fax number. The fax preference settings can be confirmed with a fax setting confirmation indicator **178**.

Returning to FIG. **11**, selecting the manage data sources option **166** brings up the manage data sources interface depicted in FIG. **16**. BRIGHTREE® or any other suitable data source(s) or external database(s) can be utilized. Here, for example, the user utilizes an enable checkbox **179** to enable access to BRIGHTREE® for external data, along with a username **181** and a password **183** each associated with a BRIGHTREE® account, with some embodiments requiring the user retype these fields to provide confirmation of the input. The manage data sources interface can also utilize an external data source setting confirmation indicator **185**. Other embodiments may use any other suitable indicator type to enable access, or none at all. Still other embodiments may not require authentication into an external data source or external database, or may store such required data within the user's instant account described herein.

Returning to FIG. **11**, selecting the user management option **182** can bring up the user management interface depicted in FIG. **17**. This interface can include user filtering options **186** that allow users to be filtered according to a branch location and/or user status. In some embodiments, user status types can include online, offline, new, deleted, and locked. Each user listed has a user action **188** and a user status **190**, wherein the user action **188** that can correspond to a user's current status **190**. For example, a user with an online status **190** may have a user action **188** to edit the user. A user with an offline status **190** can have a user action **188** to either edit or remove the user. A user with a status **190** of deleted can have a user action **188** of restore. A user with a status **188** of locked can have a user action **190** of unlock. In some embodiments, any field in a table of results can serve as a basis for sorting records in the table, wherein one criterion (such as name **102** or email address **50**) can serve as the basis of the sorting, wherein the sorting order can be reversed each time the criterion is reselected. This can also include the option to have sorting by any number of any number of fields (1, 2 … n) utilized as sorting criteria, such that records in a table could be first sorted by name **102**, then by email address **50**, and so on, according to any other fields in the table.

Each user can also be displayed by their name **102** and/or email address **50**. Each user also can also have a menu of user actions **192**, which may include, for example, resetting the user's password **197**, logging the user off **104**, setting branch user permissions **198**, and disabling the user's account **199**. There is also an option to add a new user **194**. FIG. **18** depicts an add new user interface **195** and a new user confirmation indicator **196**.

Returning to FIG. **17**, selecting the set branch user permissions option **198** can bring up the branch user permissions interface depicted in FIG. **19**. For each branch, such as the 'PIRT Sales' branch, each user's name **102** can be listed, along with options associated with the branch to permit access **202** for the user to branch emails, to allow the user to receive email alerts **204**, and to allow the user to receive notifications **206** of branch emails. In some embodiments, denying access **202** to a user can preclude options to permit the user access to email alerts **204** and/or notifications **206**. The branch user permissions interface can also utilize a set permissions confirmation indicator **207**.

In some embodiments, the branch administration option **106** can be selected at any time to bring up the branch management interface depicted in FIG. **20**. Some interfaces, such as FIG. **20**, can include menu options such as the admin option **180**, company option **208**, branch administration option **106**, user management option **182**, and fax number management option **184**. A listing of branches which can be associated with a particular company's account is displayed. Such a listing can be refreshed at any time from BRIGHTREE® or any other suitable external data source or external database. Any interface described herein can utilize a suitable external data source or external database to import/refresh data. Embodiments can utilize any suitable data migration/facilitation technique, such as ETL (Extract-Transform-Load), which can be utilized to facilitate data between any databases and/or data sources. For example, data can be extracted from a BRIGHTREE® database, transformed from any form utilized in the BRIGHTREE® database into any format utilized by any destination database utilized by any embodiment described herein, and then loaded into the destination database. ETL can utilize data from any number of databases and/or data sources, implementations of which can be, for example, relational, object-oriented, schema-based (*e.g.*, star, snowflake, OLAP-cube), unstructured, etc. Embodiments can utilize parallel processing with ETL, with types including data parallel processing, component parallel processing (running multiple threads/processes), and pipelining (running a plurality of components with respect to a data stream). Some embodiments can have a virtual ETL implementation, which can utilize metadata for abstract object representation.

Each branch listing has branch options to edit **212** or remove **213** the branch from the listing. Each listing also displays the branch name **211**, city, state, phone number, and fax number, although any other known information can also be displayed. There is also an option to add a new branch **214**.

Selecting a branch name **211** in FIG. **20** can bring up branch information as depicted in **216** of FIG. **21**. Selecting the branch edit option **212** in FIGS. **20** or **21** can bring up editable versions similar to the branch information fields **216** in FIG. **21**. The branch removal option **213** may be unavailable for some branches. In FIG. **20**, selecting an option to add a new branch **214** can also bring up editable versions similarly to the branch information fields **216** in FIG. **21**. FIG. **21** also includes a branch user management interface similar to FIG. **17**, except the users are already filtered according to the instant branch.

By selecting the company options **208** in an interface such as that depicted in FIG. **20**, the company management interface depicted in FIG. **22** can be utilized. The company information **218** includes Profit Analysis Settings, which can include a desirable (*e.g.*, green) level profit index **220** and a minimum threshold for a warning-level (*e.g.*, yellow) profit index **222**. By selecting to edit the company information, all company information **218**, including the desirable (*e.g.*, green) level profit index **220** and a minimum threshold for a warning-level (*e.g.*, yellow) profit index **222**, are modifiable.

By selecting the admin option **180** in an interface as depicted in FIG. **22**, an admin panel is presented as shown in FIG. **23** with an admin options menu **224** and account plan details **228**. The admin options menu **224** can include the company option **208**, the branch administration option **106**, the user management option **182**, the fax number management option **184**, and a company logo management option **226**. Selecting the company logo management option **226** can bring up the logo management interface depicted in FIG. **24**. The logo management options **230** allow an image to be uploaded or imported through drag-and-drop or any other suitable interface.

Returning to FIG. **11**, selecting the fax number management option **184** can produce the fax number management interface depicted in FIG. **25**. This interface can display fax data **232** containing a record for each fax number listed that includes the fax number, a fax name, inbound monthly usage, outbound monthly usage, and a total (inbound and outbound) monthly usage. The term usage as related to a fax number can relate to any suitably measureable quantity, such as time usage, cost usage (in any currency/denomination), or page count, for example. The interface can also display a fax history for any fax number, such as the 12 month history depicted. Total usage and page allocations can also be displayed. A new fax number request **236** can be submitted that can integrate the fax number into all fax functionality described herein.

A fax edit option **234** can bring up the fax number permissions management interface depicted in FIG. **26**. In this interface, there is an option to update the fax name **238** associated with the fax number. Further, fax permissions **240** associated with users at a given branch or company can be edited. Fax permissions **240** can include permitting access for a user to the branch's inbound faxes **242**, which allows the user to optionally receive email alerts **244** and/or user notifications **246** when a fax has been sent to the fax number. Fax permissions **240** can further include outbound fax options, which include outbound faxing access **248** that permits the user to send faxes using the fax number and a set-as-default option **250** which sets the fax number as the user's default for outgoing faxes. The fax number permissions management interface can also utilize a fax options permission confirmation indicator **251**.

Returning to FIG. **8**, selecting the option to create a new client **142** can bring up the add client interface depicted in FIGS. **27-28** or any other suitable interface to receive client data, wherein some or all fields can be required. The add client interface depicted in FIGS. **27-28** may include client interface options **300** such as searching clients, adding a new client (presently depicted), and other options depicted below (for example, the client's name, workflows associated with the client, client photos, and client notes). In FIG. **27**, client information **301** can be entered, such as client biographical and physical information. The add client interface can further utilize client contact information **302**, including the branch with which the client is associated. In FIG. **28** the interface can utilize optional parent/guardian contact information **304** (such as name(s)), responsible party contact information **306** (such as relationship to client, first name, last name, address, and contact information), and emergency contact information **308** (such as relationship to client, first name, last name, address, and contact information), although other embodiments can make such information mandatory. The add client interface can further utilize a new client confirmation indicator **309**.

FIG. **29** shows a client information interface that, in some embodiments, creates objects that can be associated with a new workflow. Client information **310** can be displayed, corresponding to client-related data **300, 302, 304, 306,** and **308** that what was previously entered in FIGS **27-28**. The client information interface can present an option to edit the client **312**, which may present a client information interface similar to that discussed above with respect to FIGS. **27-28**. The client information interface in FIG. **29** can also present an option to delete the client **314**, which may result in a deletion confirmation being present prior to deletion of client information.

The client information interface can also present an option to view notes associated with the client **316**, which can bring up a client notes interface as illustrated in FIG. **30**. The client notes interface contains a client note field **322**, which in some embodiments can be a text field. In other embodiments, the client note field **322** can be a customized comment field, as will be discussed below. Any interface described herein can present any number of text editing options **324** for any textual field disclosed throughout. Text editing options **324** can be presented as icons or as any other type of suitable selectable options, and can include, for example: cut, copy, paste, paste as plain text, text color, text size, subscript, superscript, paste from another program such as WORD®, font, special characters, paste with source formatting, paste with destination formatting, paste with mixed formatting, undo, redo, spell-check (occurs upon user request), bold, italicize, underline, strike-through, highlighting, bullet-points, line spacing, text justification/alignment, text tables, and/or text field size modification. In some embodiments, such as disclosed in text editing options **422** of FIGS. **39-41**, a real-time spell-check feature **424** can be utilized.

The client notes interface can also display notes previously created regarding the client **326**. Each note has options to be removed **328** and to be shared **330**. Some embodiments permit such sharing to include any other user, whereas other embodiments can restrict sharing by any appropriate criteria, such as (by way of non-limiting examples) user accounts associated with the client, user account type, or office branch. The client notes interface can also utilize an add note confirmation indicator **325**.

Returning to FIG. **29**, the client information interface further provides an option to view an audit history **320** related to the client. FIG. **31** shows an exemplary client audit interface, which can display, for example, information relating to the instant client's information regarding the actions performed **332**, who performed the action **334**, and when the action was performed **336**.

The client information interface of FIG. **29** continues in FIG. **32** with client diagnosis information, which can be utilized to create diagnosis objects associated with the current workflow. Client diagnosis information can be updated at any time. Client diagnosis records can include a diagnosis name **338** and an optional diagnosis code **340** and a diagnosis code input field **348**, although some embodiments may have a mandatory diagnosis code. A diagnosis record, once completed, can be added **343**. Additional diagnoses can be added through a diagnosis search field **342** where any appropriate information can be utilized, such as a diagnosis name or code. Any interface described herein that displays multiple records can utilize reorder options **341**, which can utilize arrows to move an individual record up or down, as well as being draggable, wherein a user can drag-and-drop a record to another position within a listing of records. Any other type of reordering interface can be utilized. Any multi-record interface herein, such as client diagnosis information, can utilize options for each record to edit **344** the record, remove **346** the record, and to cancel **156** the creation of a new record.

The client information interface in FIG. **32** further utilizes client insurance information, which can be utilized to create workflow objects related to insurance. The insurance information can include the insurance provider's name **350**, the policy number **352**, and the insurance order **354** (primary, secondary, tertiary, etc.). In some embodiments, modifying the order changes which insurance provider is considered primary, for example, so that the "top" insurance provider in the listing is always the primary provider, and the affected insurance records are updated automatically. In other embodiments, such automatic updating does not occur. Any input field herein, such as the policy number **352**, can be restricted by data type (character, integer, etc.), a specified length or range, complexity, or any other suitable field definition properties. An insurance record can be edited **349** and deleted **351**. Insurance providers are searchable in an insurance name search field **353**. A corresponding insurance policy number can be added in a policy number input field **355**. An insurance record, once completed, can be added **356**.

FIG. **32** continues with information regarding the client's previous equipment, which can be utilized to create workflow objects related to equipment. As illustrated, there is an option to add previous equipment **357**. FIG. **33** provides a previous equipment interface. Previous equipment data **358** can be entered, which can include, for example, the equipment's make, model, condition, serial number, date of delivery/service, original payor, original vendor, width, and depth. Any unit of measurement described herein can be of any appropriate unit type of measurement, such as metric or English units of measure. Additionally, the user can be presented with a comment text field **360** to create a customized comment field.

FIG. **34** depicts a comment field **360** containing textual input from a user. Text entered into the comment field **360** can be parsed in real-time, periodically, or based upon input received from the user to indicate that the text is ready to be parsed and/or saved. Parsing is performed when creating a template version of the text within the comment text field **360**. Parsing comment field text involves identifying, for example, instances of the client name **362** that match what was previously entered by the user as previously shown in **310** of FIG. **29,** or as identified by the user through a search of existing client records **122**, as previously shown in FIG. **9**. Returning to FIG. **34**, the client's name 'John' **362** has been entered by the user within the comment field text **360**. Based upon the stored client name, each instance of the client's name **362** within the comment field text **360** is automatically replaced with a name placeholder (not shown).

Any type of placeholder described herein can be either visible or invisible to users. In this embodiment, the text is not visibly modified to display or indicate any type of placeholder, but such visibility can be utilized in other embodiments. In this embodiment, each instance of the client's first name is replaced with a name placeholder denoting that the client's first name was utilized within a particular location within the body of text as entered by the user.

In some embodiments, each instance of a possessive version of the client's first name **364** can also be replaced with a possessive name placeholder denoting that a possessive version of the client's first name was utilized in a particular location within the comment field text **360**. As an illustration, within the comment text field **360** in FIG. **16**, the user has entered a possessive version **364** of the client's name, here 'John's.' A possessive placeholder can be utilized regardless of whether the possessive version of a name is possessive or a contraction of the client name combined with 'is.'

With respect to name placeholders and/or possessive name placeholders as described herein, such placeholders are utilized for instances of the client's first name and/or possessive instances of the client's first name. In other embodiments, with respect to name placeholders and/or possessive name placeholders, any combination(s) of first, middle, and/or last name(s), along with prefix(es), suffix(es), and/or title can be utilized and analyzed for any parsing, analysis, and/or text replacement features described herein. The utilization of a name placeholder and/or possessive name placeholder can be either case-sensitive or non-case-sensitive.

With respect to this embodiment, parsing the comment field text **360** can further involve identifying instances of pronouns **366** and **368** that match the stored client gender, either as previously entered by the user as previously shown in **310** of FIG. **29,** or as identified by the user through a search of existing client records **122**, as previously shown in FIG. **9**. Based upon the stored client gender, pronouns **366** and **368** that corresponds to the client's gender, within the user's text in the comment field **360**, can also be replaced with a placeholder (not shown). In other embodiments, placeholders can also be applied to pronouns **366** and **368** within the comment field text **360**, regardless of the gender of the pronoun, wherein a placeholder can be applied by storing the grammatical pronoun type. The utilization of a gender-specific pronoun can be either case-sensitive or non-case-sensitive. In any event, the grammatical pronoun type is also stored within a pronoun placeholder. If a subject pronoun, such as 'he,' appears within the comment field text, the placeholder will store the grammatical pronoun type. Any appropriate grammatical pronoun type can be utilized, such as subject pronouns, object pronouns, possessive pronouns, and reflexive pronouns.

If the user selects a preview option **370** to preview template text, the user can view how the template text will appear with the current client's information applied. Here the user has chosen to view the template preview text **372** titled 'Jane Test,' which then displays a modified template. At any time the user can choose a 'close' option **374** to hide or collapse the preview text. In this embodiment the user can have as many template previews open as desired, although the number of preview templates open simultaneously can be restricted in other embodiments. The template preview text applies the current client's name, possessive name, gender, and grammatical pronoun type to placeholders (not shown) with respect to client name, possessive client name, and pronouns. For example, the first word in this modified template utilizes the current client's name of 'John' **376** where a name placeholder had been utilized. The name 'John' **376** is displayed in the location within the text where a name placeholder was located. Similarly, this modified template utilizes a possessive form of the client's name, so that 'John's' **378** is displayed in the location within the text where a possessive name placeholder was located. The pronouns 'he' **380** and 'him' **382** are also displayed within this modified template. Here, the client's gender is male, which when combined with a pronoun placeholder designating a subject pronoun, produces the pronoun 'he' **380**. Similarly, combining a pronoun placeholder designating an object pronoun with the same client's male gender information produces the pronoun 'him' **382**. In this embodiment the interface presents a 'Use This Text' **384** option, which places the textual template in the comment field **360**. In some embodiments, multiple textual templates can be placed in the comment field **360** in this way.

In FIG. **35**, regardless of whether the user uses template text or writes entirely new text, there is a template save option **386** which can cause a title field **388** to appear, where the user can then input a title for this comment field text **360**. In some embodiments, the title field **388** is present regardless of whether the template save option **386** is selected. If the user selects the option to save this comment field text **360** as a template, placeholders (as described above) will be placed in the specific locations of the text they replace, if and/or where appropriate. Here this customized textual comment utilizes the client's name 'John' **390**, a possessive version of the client's name 'John's' **392**, a subject pronoun 'he' **394**, and a possessive pronoun 'his' **396**.

FIG. **36** depicts a comment update option **398** which, in some embodiments, appears in response to selecting the 'Use This Text' option **384** discussed above in Fig. **34**.

FIG. **37** depicts a completed current equipment item **400** including a customized comment from the user, along with options to edit and remove the client equipment item. Additionally, the comment text has placeholders (not shown) associated with words in the comment text corresponding to elements **390**, **392**, **394**, and **396**.

FIG. **38** depicts the comment text that a user previously created in FIGS. **34-36** now being used as a modifiable template **402** for a different client. Instead of being just a static textual comment for client John, here the template is shown being subsequently utilized for another client, Isabella. Here, the client's name, Isabella **404**, has been applied to the name placeholder that based on the utilization of John's name **390**. This generates Isabella's name **404** in the same location where John's name **390** originally was within the customized template. Similarly, Isabella's name is applied to a possessive name placeholder to generate a possessive version of her name **406** where a possessive version of John's name **392** was originally located. Moreover, Isabella's specified gender, female, is combined with pronoun placeholders in this same modified template. Where the subject pronoun 'he' **394** was originally located for John, the pronoun placeholder combines the fact that this was a subject pronoun with Isabella's specified gender to generate a more appropriate object pronoun, 'she' **408**. Similarly, where the possessive pronoun 'his' **396** was originally located for John, the pronoun placeholder combines the fact that this was a possessive pronoun with Isabella's specified gender to generate a more appropriate possessive pronoun, 'her' **410**. In this embodiment, a user can utilize any template text associate with their user account, regardless of whether the template was based on text utilized for the same client or a different client. Moreover, placeholders can be generated for any type of third-person pronouns, including possessive pronouns and reflexive pronouns. At any time (in some embodiments) the user can utilize an add equipment indicator **411**. Additionally, at any time (in some embodiments), the user can utilize an equipment completion indicator **412** to proceed to another interface, such as the assessment interface discussed below.

FIG. **38** also provides options to view/manage workflow notes **413**, view/send message **414**, connect to a BRIGHTREE® sales order **416**, and save back to BRIGHTREE® **418**. Any interface described herein can provide these options, and in some embodiments that can be selected at any time. Selecting view/manage workflow notes **412** can bring up a workflow notes interface such as depicted in FIG. **39**. To add a workflow note, a user can select a workflow note category **420** as well as enter text into a text field **426**, which can be a customized comment field as described above. There can be options to hide the editor **428** and to add the note **429** to the workflow. Text can be modified using text editing options **422**, which is another embodiment of the text editing options **324** discussed above. Here, there is an additional real-time spell-check option **424** that can utilized, although any other text editing options embodiment can it as well. Some embodiments of the workflow notes interface display previously-entered workflow notes **430**, with options to edit **432** or delete **434** a workflow note. Options are also available to 'Pop Out' **436** of the current window and to close **435** the current window.

FIG. **40** depicts options from FIG. **39** having been selected. Selecting certain categories for the workflow note category **420** can trigger an additional category field **422** to enter or select a new or different type of workflow category. In some embodiments, the additional category field **422** may always be present, and may not be an option in other embodiments. In some embodiments, selecting the real-time spell-check option **424** in FIG. **39** can bring up a menu of spell-check options, which are readily known in the art and do not warrant further discussion. Selecting to edit **432** a workflow note in FIG. **39** can open the note to editing as depicted in the bottom of FIG. **40**, wherein the editing of the pre-existing workflow note can utilize its own editable workflow note category **420** field, text editing options **422** that can include a real-time spell-check option **424**, and an editable text field **426** (that can be a customized comment field in some embodiments). In some embodiments, the user can update the workflow note **437** at any time, whereas other embodiments may require criteria be satisfied prior to being able to update this text.

FIG. **41** depicts the result of selecting the 'Pop Out' **436** option in FIG. **39**. This option can open the current interface screen in a separate window, while the previous interface screen remains open in the original window.

Returning to FIG. **38**, a user can select an option to view/send workflow messages **414**, which can bring up a workflow messaging interface as depicted in FIG. **42**. Options can include viewing workflow messages **438** and composing a new workflow message comprising selecting one or more recipients **440** and drafting a message **442** in a text field. In some embodiments, the message field **442** can be a customized comment field, as described above. In some embodiments, there is a reply indicator **443** utilized to send the message **442** to the specified recipient(s) **440**.

Returning to FIG. **38**, a user can connect to a sales order **416** from BRIGHTREE® or any other suitable data sources or external databases, which may require separate authentication. This can pull or import any suitable data into the current (or any designated) workflow. Additionally, a user can save (or export) workflow data **416**, for example workflow object data, into BRIGHTREE® or any other suitable data sources or external databases.

Continuing with the exemplary interface depicted in FIG. **38**, FIG. **43** provides options to search for a physician **444** and/or add a new physician **446**. By searching for a physician in the physician search field **444** in FIG. **44**, some embodiments may present suggested search results of known physician records **448**. For example, by entering the search string 'an' into the physician search field **444**, each result can differentiate the string 'an' within the name of each physician by way displaying the string 'an' as a different font color than the rest of the physician's name **450**. Here, the physician in the last record **448** has the name 'ANGELA.' The first two letters 'AN' are displayed in a different font color than the remaining (non-matching) letters 'GELA.' Other embodiments may utilize other suitable techniques for textual differentiation, such as bolding, underlining, italicizing, etc. Here, the search results are updated in real-time as search input is modified. Some embodiments may only update their search results based upon an input indicating that new results are desired.

Returning to FIG. **43**, a user can also add a physician record **446**. FIG. **45** depicts an exemplary interface for adding physician information **452**, including (but not limited to) name, credential, NPI number, license number, UPIN number, phone/fax number(s), email address(es), and mailing address(es). An add physician indicator **453** can also be presented.

Returning to FIG. **43**, a user can also start a new workflow. A workflow type **454** is selected. Workflow types can include, for example, a basic order, a complex rehab workflow, and a general document workflow, with other workflow types being possible as well. A workflow deadline date **456** and a client evaluation date **458** can also both be entered, in some embodiments, along with a start workflow option **459**.

FIG. **46** depicts an exemplary workflow creation interface. Workflow interface options **500** can include, for example, accessing client info, items, profit analysis, final review, and documents, each having its own interface to be discussed in detail below. Workflow interface options **500** can be implemented utilizing hyperlinks or any access mechanism. A deadline date **501** can be displayed, along with a notice (such as 'overdue') when the deadline date has been exceeded. Some embodiments can have various notifications (regarding an approaching deadline and/or an exceeded deadline), along with user-definable notifications and notification threshold values. Workflow actions can include changing the workflow status or date needed **502** as well as an option to delete the current workflow **504**. Selecting the option to change the workflow status or date needed **502** can bring up an interface such as what is shown in FIG. **47**. Here, a user can view workflow information **506** which may include an order number, client name (any suitable client identifier), a modifiable workflow status (*e.g.*, in progress, completed, cancelled), and a modifiable date needed (get-it-done-by date). The user can also utilize workflow information update indicator **508**.

Returning to FIG. **46**, the exemplary workflow creation interface can include an editable evaluation date **458** and editable client information **310**. Various data described herein can be derived from previously entered or retrieved data (whether from an internal or external database/data source). For example, the evaluation date **458** depicted here utilizes the evaluation date entry previously received and discussed above with respect to FIG. **43**. Likewise, the client information **310** in FIG. **46** utilizes the client information previously discussed above with respect to FIG. **29**, which itself was previously entered in **301**, **302** of FIG. **27**. As utilized throughout, a completion icon (such as a check-mark **498**) can indicate that one or more data fields meet one or more requirements placed upon the data they contain. This can be utilized in form validation, for example. Any type of indicator can be utilized to represent a completion icon **498**.

Turning to FIG. **48**, editable diagnosis information is utilized that can be based on the diagnosis data previously entered in FIG. **32**. Client diagnosis records can include a diagnosis name **338** and an optional diagnosis code **340** and a diagnosis code input field **348**, although some embodiments may have a mandatory diagnosis code. Additional diagnoses can be added through a diagnosis search field **342** where any appropriate information can be utilized, such as a diagnosis name or code. Additionally, some embodiments allow new diagnoses can be added (not shown). A diagnosis record update option **509** can be presented for a presently edited diagnosis record. Some embodiments may restrict when the diagnosis record update option **509** is usable.

Editable insurance information is utilized that can be based on the insurance data previously entered in FIG. **32**. The insurance information can include the insurance provider's name **350**, the policy number **352**, the insurance order **354** (primary, secondary, tertiary, etc.), and provider number **510**. In some embodiments, modifying the order changes which insurance provider is considered primary, for example, so that the "top" insurance provider in the listing is always the primary provider, and the affected insurance records are updated automatically. In other embodiments, such automatic updating does not occur. Any input field herein, such as the policy number **352**, can be restricted by data type (character, integer, etc.), a specified length or range, complexity, or any other suitable field definition properties. An insurance record can be edited **349** and deleted **351**. Insurance providers are searchable in an insurance name search field (not shown). A corresponding insurance policy number can be added in a policy number input field **353**. Other insurance data can include an insurance fax number **516**, an insurance provider number **512**, and an insurance end date **518**. An insurance record update option **510** can be utilized for a presently edited insurance record. Some embodiments may restrict when the insurance record update option **510** is usable. For any insurance record, there can be options to use the insurance policy **520** or not to use the insurance policy **522**. In some embodiments, the user must select to use the insurance policy **520** or not to use the insurance policy **522** to satisfy the criterion associated with an alert indicator **496** (which can utilize any suitable alert or graphical icon). An alert indicator **496** can be utilized throughout to indicate that one or more fields does not meet one or more requirements placed upon the data they contain. This can be utilized in form validation, for example. Any type of indicator can be utilized to represent an alert indicator 496. An insurance record, once completed, can be added **356**.

Continuing with FIG. **48**, the workflow creation interface can receive input that searches for a clinician **524** as well as adding a new clinician **526**. The clinician search option **524** can, in some embodiments, resemble the physician search described above with respect to FIG. **44**. If a new clinician is added **526**, a clinician creation interface **528** depicted in of FIG. **49** can be utilized, which can include a clinician creation option **529**. The clinician creation interface **528** can receive data regarding, for example, a clinician's name(s), credentials, phone number(s), fax number(s), email address(es), and mailing address(es). The workflow creation interface can also provide an interface regarding physician information **452** that could previously have been collected as illustrated above with respect to FIG. **44-45**. The physician information interface in FIG. **49** can provide options to use the instant physician **530**, or not use the instant physician **532**.

FIG. **50** depicts an example of using the option to use the instant physician **530**, wherein physician information **452** is displayed, along with options to edit the physician **534** and delete the physician **536**.

Regarding choice of vendor, a user can add a vendor from a list of available vendors **537** or self-select **539** (if they are utilizing a vendor-type account). In other embodiments, the vendor list can be searchable as described above with respect to physicians and clinicians. In some embodiments, the functionality regarding vendors can be attributed to other roles (such as physicians or clinicians) and vice-versa, depending upon the type of account the user is utilizing.

Regarding individuals designated to be client evaluation participants, each participant can be listed as a participant record **542**. Participant record fields **544** can include the participant's name, title/relationship to the client, and a reordering option **341** as discussed above, and which can be utilized for any multi-record interface described herein. Each participant record can also have options for editing **541** and deleting **543**. Additionally, there can be options to add another evaluation participant **545** as well as the user being able to self-select with an 'add me' option **547**.

FIG. **51** subsequently depicts the addition of a vendor and an additional evaluation participant. Now that a vendor has been specified by the user (in this example the self-selection option **539** depicted FIG. **50** was utilized), the vendor's information **538** (which is also the instant user) is displayed for review along with a vendor removal option **540**. Further, an additional evaluation participant record **535** has been added from FIG. **50**. Additionally, FIG. **51** also displays an example of a new evaluation participant record **546** being added in response to the add participant option **545** being selected in FIG. **50**. A new evaluation participant record **546** can include fields to enter the participant's name **543** and their title/relationship to the client **533**, wherein an option to add the evaluation participant **547** can be available at any time, or in some embodiments, once certain criteria have been satisfied. A currently edited record can be subject to input requirements in order to add the evaluation participant **547**. Further, in some embodiments, a client information completion indicator **548** now appears in FIG. **51** once all required fields have been completed, wherein the user can then be directed (for example) to an items interface.

FIG. **52** depicts an example of an item information interface with options to find items **531** and manage added workflow items **549**. A user can utilize an item completion indicator **551** to proceed to a profit analysis interface, depicted below in FIG. **54**. In some embodiments, utilizing the find items option **531** brings up an item adding interface as illustrated in FIG. **53**. The exemplary item adding interface may utilize search type options **550** that can include, for example, search favorites, search items, and/or item kits. Search favorites can be items that were previously indicated as a favorite by one or more users, which may or may not include the same user. Frequency of selection or viewing of items can also form the basis of which items are designated as favorites, although any suitable criteria can be utilized. Item kit search options **550** can be based on, for example, pre-defined or user-defined groupings of items, although any appropriate grouping criterion/criteria can be utilized. Regarding the search item option **550**, item search method choices **552** can include searching internal data sources/databases and/or external data sources/databases such as BRIGHTREE®. The search items interface can further receive search item input **554** specifying (at least part of) an item name or code, such as an HCPCS (Healthcare Common Procedure Coding System) code. Item search results **556** can be displayed in any appropriate manner, such as a list of checkable items that display an HCPCS code and an indicator of whether an item is available for importation from an external data source/database such as BRIGHTREE®. Any data listing herein having checkboxes can utilize a check-all/check-none master-type checkbox, located in any appropriate location in its respective interface. Here, each item in the exemplary item search results **556** further includes the ability to add an item **558**. In the example depicted in FIG. **53**, each item has its own selectable 'add' option, along with an add option to add all items that are checked.

Added items **549** can have selectable item actions **560** such as editing and deletion. Each added item can also have an associated checkbox, with a master-type checkbox to select/de-select all added items **549**. Added item options **562**, which can be applied to those added items that are checked/selected, include item actions and kit actions. Item actions can include (for checked/selected added items) showing/hiding item justification(s), showing/hiding item note(s), and removing the item(s) from the instant workflow, as discussed below.

Kit actions can include (for checked/selected added items) adding items to an existing item kit and creating a new item kit. FIG. **54** depicts the selecting of items that were previously added to a workflow **549**, where the selected items are designated to be added **562** to an existing item kit **564**, here illustrated as a drop-down list of item kits. Other embodiments can use a text search field (as discussed above) or any other suitable search and/or selection interface(s). Once the proper items have been designated for addition to the specified item kit, an item kit assignment indicator **566** can be utilized for confirmation. FIG. **55** depicts the creation of a new item kit **568** based on specified items among items previously added to a workflow **549**. Returning to FIG. **53**, once items and/or item kits have been indicated, a profit analysis indicator **551** can be selected.

FIG. **56** illustrates an exemplary profit analysis interface. One or more insurance policies/providers **572** can be selected for analysis, here utilizing respective graphical tabs, based on insurance information received in the interface depicted in FIG. **32**. Other embodiments can receive insurance input within the exemplary profit analysis interface depicted in FIG. **56**. Each item **574** can be analyzed for a given insurance provider/policy **572**, with an optional code **576** (such as a PX code or prescription code), an item quantity **578**, a unit cost **580**, a unit billed amount **582**, a unit allowance amount **584**, a total cost amount **586**, a total billed amount **588**, a total allowance amount **590**, and/or a final allowance amount **592**. Here, the item quantity **578**, unit cost **580**, unit billed amount **582**, unit allowance amount **584**, and final allowance amount **592** can be specified. The total cost amount **586** for an item is determined by multiplying the item quantity **578** by the unit cost amount **580**. The total billed amount **588** for an item is determined by multiplying the item quantity **578** by the unit billed amount **582**. The total allowance amount **590** for an item is determined by multiplying the item quantity **578** by the unit allowance amount **584**. A summed cost total **594** is calculated by adding together the total cost amount **586** for each item **574** listed. A summed billed total **596** is calculated by adding together the total billed amount **588** for each item **574** listed. A summed allowance total **598** is calculated by adding together the total allowance amount **590** for each item **574** listed. A summed final allowance total **600** is calculated by adding together the final allowance amount **592** for each item **574** listed. A profit index **604** is calculated as a ratio of the summed cost total **594** to the summed final allowance total **600**. As shown, for example, the final allowance total **600** of $250 is divided by the summed cost total **594** of $150 to give a profit index **604** of 1.67. Profit index range thresholds **602** can also be utilized, for example, to make feasibility projections, among other purposes. As illustrated, a desirable profit index **604** could be at a ratio of 2.0 or above, and could be indicated by displaying the profit index **604** as green. A cautionary profit index **604** could be at a ratio of at least 1.4 but less than 2.0, and could be indicated by displaying the profit index **604** as yellow. A warning-level profit index **604** could be at a ratio of less than 1.4, and could be indicated by displaying the profit index **604** as red. Any color, or any other type of indicator, could be used to signify each range threshold **602**. Moreover, although three range thresholds **602** are depicted, any quantity of range thresholds **602** can also be utilized. A range threshold modification option **606** can provide an interface as shown in FIG. **57**, which can correspond to data in the interface illustrated in FIG. **22**. For example, FIG. **57** can present editable company information **218**, as well as receive input specifying a minimum threshold for a desirable (*e.g.*, green) level profit index **220** and a minimum threshold for a warning-level (*e.g.*, yellow) profit index **222**. Some embodiments can present a default value (as shown), as well as a revert-to-default option (not shown). Completion of the editing in FIG. **57** can be signified with an update company indicator **609**, for example. When the profit analysis is complete in FIG. **56**, a review indicator **608** can be utilized to conduct a review of workflow data.

FIG. **58** depicts an exemplary interface to review client information and workflow objects. The client evaluation date **458** and an edit option are present, along with editable client information **310** that was previously entered. Additionally, client diagnosis objects can also be presented for review and modification. Client diagnosis records (and thus diagnosis workflow objects) can include a diagnosis name **338** and an optional diagnosis code **340** and a diagnosis code input field **348**, although some embodiments may have a mandatory diagnosis code. A diagnosis record, once completed, can be added **343**. Additionally, any diagnosis can be edited **344** or removed **346**.

FIG. **59** continues with the exemplary client information interface to review client information and workflow objects. Client insurance information can include the insurance provider's name **350**, the policy number **352**, and the insurance order **354** (primary, secondary, tertiary, etc.). In some embodiments, modifying the order changes which insurance provider is considered primary. For example, the "top" insurance provider in the listing may always be the primary provider, and the affected insurance records are updated automatically. In other embodiments, such automatic updating does not occur. Any input field herein, such as the policy number **352**, can be restricted by data type (character, integer, etc.), a specified length or range, complexity, or any other suitable field definition properties. An insurance record can be edited **349** and deleted **351**. There is also an option to add an additional insurance policy **609**, for example a tertiary insurance policy as shown.

An editable subject **610** can be presented, along with a primary item which may have a primary equipment category **612**. FIG. **60** depicts an example of selecting a primary equipment category **614**, although a custom-creation primary equipment category option (not shown) is available in some embodiments for a user to create their own primary equipment category. FIG. **61** depicts an example of a primary equipment model selection option **613** in response to a primary equipment category **612** having been selected. A custom-creation primary equipment model option (not shown) is available in some embodiments for a user to create their own primary equipment category. An add primary equipment confirmation option **614** can also be presented upon satisfaction of conditions such as selecting a primary equipment category **612** and a primary equipment model **613**. In other embodiments, the option to add primary equipment confirmation **614** can always be available.

In FIG. **62**, a primary equipment item can be presented with options to edit **632** or remove **634** it. A primary equipment note **636** can be added, which can be in the form of a customized comment field, as discussed above in FIGS. **33-38**. Accordingly, there are options to make a note the user's default note **638** as well as to copy the note and create an alternate note **640** with the contents. There are also re-ordering options **341** as more than one primary item can be utilized in some embodiments. Utilizing the option to edit a primary item **632** (or other items) can bring up the edit primary equipment interface, an example of which is illustrated in FIG. **63**. A code input field **642** can be utilized to receive an HCPCS (or any other appropriate) code. A remember item details option **644** can be utilized, here in the form of a checkbox, although any suitable indicator can be utilized in various embodiments. An option to preview a stock justification **646** can reveal stock justification text **648**, which can be specific to the item or utilized for other items as well. A hide option **650** for the stock justification can be utilized as well. An equipment note **360** which utilizes a customized comment field (discussed above with respect to FIGS. **33-38**) can be utilized, along with options to its text as a new alternate note **386** as well as an option to designate the instant note by default **652** for the item. Various embodiments may more broadly apply default note options to an equipment brand, or even across all items, for example.

Returning to FIG. **59**, an item list can utilize one or more equipment item records **549**. Each item record can display an edit option **614** and a delete option **616**, as well as either a model number or an option to enter a model number **618**. For each item, an item note **620** can be added, which can be in the form of a customized comment field, as discussed above in FIGS. **33-38**. Accordingly, there are options to make an item note the user's default note **622** as well as to copy the note and create an alternate item note **624** with the contents. There can also be an option to add another item **626**, which can bring up an interface to add another item, an example of which is depicted in FIG. **64**. Such an interface can present options to select categories of items according to equipment tabs **654**, for example, which can be by equipment brand or equipment type. Any suitable interface can be utilized to group equipment items in this manner. An item search option **656** can be presented, utilizing any search techniques/interfaces presented herein. An option to create a new item **658** can be presented to bring up an interface to quick-add a new item, such as depicted in FIG. **65**. This quick-add interface may include, for example, fields for the item's name, item code (such as an HCPCS code), and a model number. Additionally, equipment categories **674** can be presented as checkboxes (or any other suitable input fields) allowing one or more categories to be chosen. Some embodiments can restrict a new item to a single equipment category. Any or all of the quick-add interface fields can be optional or required.

Returning to FIG. **64**, the exemplary interface to add an item can further display a listing of items according to a criterion, such as the equipment tab **654** discussed above. A numeric total of items **662** (which includes primary item(s) here, but not in other embodiments) can be presented. Items that have been designated as a favorite **664** can have an indicator, such as a star. In some embodiments, such designation can be exclusive to a particular account or accounts within a company or branch (or other affiliation). In other embodiments, favorites can be designated by any user, with all other users subsequently seeing such designation. All such possibilities can also be utilized to un-designate an item as a favorite as well. An advertisement **665** can be utilized as shown, or utilizing any other suitable technique that is known in the art. Some embodiments may not utilize advertisements. Other embodiments can utilize advertisements anywhere described herein.

Returning to FIG. **60**, clinician information **528** can be presented with options to edit the clinician **628** or to delete the clinician **630**. Turning to FIG. **66**, the exemplary interface to review client information and workflow objects can further include physician data **452**, with options to edit **676** or delete **678** the physician. Editing physician information can bring up an interface, such as depicted above in FIG. **45**. The instant interface can also present vendor data **538**, with an option to remove the vendor **540**. Some embodiments may utilize an edit feature, and/or more than one vendor with search and/or sorting options. The instant interface can also provide individuals designated to be client evaluation participants, wherein each participant can be listed as a participant record **542**. Participant record fields **544** can include the participant's name, title/relationship to the client, and a reordering option **341** as discussed above, and which can be utilized for any multi-record interface described herein. Each participant record can also have options for editing **541** and deleting **543**. Additionally, there can be options to add another evaluation participant **545** as well as the user being able to self-select with an 'add me' option **547**. There is also an option to complete the exemplary client information interface to review client information and workflow objects **680**, which in the instant embodiment is only accessible when specified criteria are satisfied. Other embodiments can permit it to be utilized at any time.

Utilizing the complete final review option **680** can bring up a workflow template management interface, as in the exemplary interface depicted in FIG. **67**. Template records **1000** can be presented, with selection options **1002** (such as the exemplary checkboxes) to select some, all, or none of the available template records, along with a master checkbox able to select all/none of the template records **1000**. Each template record **1000** may include (for example) a template name **1004**, a template status **1006**, a QA (quality assurance) option **1008**, a team notes indicator **1010**, and template actions **1012** (*e.g.*, download **1014**, template builder **1016**, secure send **1018**, send fax **1020**, upload signed copy **1022**, remove **1024**, etc.). A group template action **1026** can provide all or some of the template actions **1012** that can also be utilized with the selection options **1002** to apply a group template action **1026** to each selected template **1002**. Each template record may also provide a selectable template name **1028** and a template status indicator **1030**. Some templates may have a template edit option **1032**, which may be triggered (for example) by required template fields not having been completed, and causing a message stating such.

Templates can also be managed by searching for an existing template **1034** or uploading a document template **1036** utilizing any suitable upload interface and any suitable file type. Template requests **1038** can be displayed based on templates received from a secure send **1018** request. Fax requests **1039** can be displayed based on faxes received from a send fax **1020** request.

FIG. **68** shows an example of team notes content **1011** in response to receiving a selection of a team notes indicator **1010**. By selecting a template's status **1006** in FIGS. **67-68**, such as 'Physician's Written Order', a status history interface can be presented, as shown in FIG. **69**. This interface can have template management tabs **1040** which may include, for example, a view template interface, a template QA interface, and the instant exemplary status history interface. A status history interface can include a status option **1007** (which can include options such as 'signed' and 'recalled') and a file selection/upload option **1042**. A 'Signed By' input field **1044** can provide selection (or input) of a user (such as the client, clinician, vendor, or physician) associated with the instant workflow. A template note **1046** may be entered as well, which in some embodiments can be a customized comment field **360**. The template's status can be updated **1048**, which may result in the updating of status updates **1049** associated with the template.

Selecting the template QA option of the template management tabs **1040** (or the QA option **1008** depicted in FIGS. **67-68**) can bring up the QA interface depicted in FIG. **70**. The template's QA interface can include a QA item list **1050**, which can include a listing of QA items, a quantity of QA items remaining, who completed each QA item listing with a date/time stamp, and an option to reset some/all QA items. A template status indicator **1051** can be utilized (which may correspond in some embodiments to the template status indicator **1006** in FIG. **67**). QA messaging options can include a request for review **1052**, which may trigger options to specify a user to perform the review **1054** along with comments **1056** (such as further instructions) to the specified user. An option to designate the QA message as urgent **1058** can also be selected, wherein some embodiments can use any number of levels of priority. When ready, a QA save option **1060** can save data in the QA interface.

A rendered template preview interface is illustrated in FIG. **71**, which can be selected (for example) by choosing the 'View Document' in the template management tabs **1040** or selecting a template name **1028** (as depicted in FIGS. **67-68**). Here, a different exemplary template (Delivery Ticket Custom Text Field) is utilized. A template thumbnail **1062** for each page can be displayed in any area of the template preview interface, with a larger view of the rendered document **1064** (based on the instant template) that populates the rendered document with workflow object data such as the instant workflow's client information **1061**, the instant workflow's insurance information **1063**, the instant workflow's diagnosis information **1065** and date information, and the instant workflow's equipment data **1066**. An edit template option **1068** can also be presented to bring up a template editing interface. Any field can be encrypted (at any level, including at the application level and/or database level), wherein a field can be decrypted for rendering purposes, while remaining encrypted in the database. Some embodiments can encrypt all fields, with as many levels of encryption as desired.

An exemplary template editing interface is illustrated in FIG. **72**, which corresponds to the 'Delivery Ticket Custom Text Field' template in FIGS. **67-68** having an 'Edit Document' option **1032**. Here, there are four required fields awaiting completion, which may trigger a corresponding notice **1067** in the template editing interface. A show/hide field list option **1069** can be selected to show/reveal fields utilized in the template. A view document option **1070** can bring up the rendered document preview interface (previously discussed above for FIG. **71**). Required fields **1072** can be displayed on the template (such as a delivery date and specifying whether a HIPPA signature is on file). Required fields **1072** may utilize textual input, selectable options, or any other suitable type of input mechanism. The template editing interface may also have options to save the template **1073** as well as to save and close the template **1075**. In some embodiments, an item or group of fields that exceed a rendered page can be rendered across subsequent rendered pages as needed.

FIG. **73** depicts a signature field from the last page of the 'Delivery Ticket Custom Text Field' template, the first page having been discussed above with respect to FIG. **72**. Here, this exemplary signature field can utilize a print name field **1074** to receive the name of the signatory, along with options to type a signature **1076** or to draw a signature **1078**. In accordance with the signature drawing option **1076**, a user can draw or click to generate a signature by any suitable interface, such as with a mouse, a touch-screen, stylus/pen, biometric interface (eye/head/limb/digit movement), etc. If the signatory differs from the client, an authorization option **1082** can be utilized to signify that the signatory is authorized to sign for the client. The signature (in either drawn **1076** or typed **1078** form) can be cleared/reset **1086**, as well as be saved **1084** and reused for other forms and/or workflows.

Saving a signature **1084** can result in the signature being displayed in the template editing interface illustrated in FIG. **74**. Required fields **1072** can display current values (if any), such as a smaller/preview version of the drawn signature described above in FIG. **73**. In some embodiments, an actively-selected field **1072** (which may or may not be required) can display an active field edit option **1077**, which can bring up a field edit interface such as described above in FIG. **73**. Another required field **1072** in FIG. **74** that has been completed displays the text value 'test' and deemed completed. Another required field **1072** displays a default value 'Click to Sign' indicating that it is not yet completed, as indicated in the template editing interface notice **1067** that two required field still remain to be completed. Some embodiments can tally required fields per template and/or per page in a template.

FIG. **75** further depicts the workflow template management interface discussed above with respect to FIGS. **67-68**. Here, a search is being conducted based on a portion of text entered **1034** to search both templates **1088** and template sets **1094**. There can be options to attach a selected template search result **1090** to the instant workflow and/or preview **1092** the selected template search result. There can also be an option to attach **1096** a template set search result **1094** to the instant workflow, as well as to preview the selected template set (not shown).

An example of a previewed template **1092** is depicted in a template preview interface in FIG. **76**, which presents an option to attach **1090** the previewed template to the instant workflow.

FIG. **77** is a flowchart depicting an example of a template builder interface. In **1200**, a user selects an existing form, or creates or uploads a new form. In **1202**, the template builder interface displays an editable template with editable field templates. In **1204**, a user can request a listing of available field templates in the template. In **1206**, a user can import fields from the listing of available field templates by dragging a field template from the listing onto the template. Once a field is dragged onto the form, it can be a currently-selected, or active, field **1208**. Some embodiments can present currently-selected field-type options while hovering over a field (without actually selecting the field). In some embodiments, dragging a field onto a form does not by itself designate the field as currently-selected. A currently selected field can present copy and delete field options **1210**. Any field can be dragged to change its location **1212** as well as having its borders dragged to affect its size. In some embodiments, a field can be dragged from one template page onto another page in the template. A currently selected field can also present edit field properties **1214**, which can include (for example) editable general options **1216**, editable field options **1218**, and editable field recipient options **1220**. Editable general options **1216** can include field name, geographic/pixel position, field size, font size, a flag to copy field to other pages in form, required-field flag, team-notes text field, for example. Edit field properties **1218** can include render options such as drop-down choices utilizing delimited input, unit type (weight units, time units, depth/width/height units), split-value (specifying a quantity of fields), value check (utilizing comparison value), draw circle (utilizing comparison value), character limit, a default value, and whether a default value is optional or mandatory, for example. Editable field recipient options **1220** may include recipient role selection type (*e.g.*, clinician, physician, client, vendor) as well as a recipient-note text field. Only users of the selected recipient role type can see/utilize the instant field when the recipient receives the instant form. In some embodiments, a recipient can be entered instead of selected from a searchable listing. Once field properties **1218** have been modified the instant field can be saved/updated. In some embodiments, a field can be saved/updated even without changes being made. At any time, a preview view **1224** can be selected to show a rendered version of the template with all modifications, even those that have not been saved. At any time, a user can exit the template builder interface by cancelling or saving changes **1226**.

FIG. **78** depicts an example of the template builder interface. A template thumbnail **1062** for each page in a template can be displayed in any area of the view interface, along with rotation options **1300** to rotate a page clockwise or counter-clockwise by, for example, 90 degrees. Some embodiments also allow a user to specify the amount of rotation in terms of degrees, radians, or any other suitable angular distance. Template page order can be modified in some embodiments utilizing arrows (other other indicators) on template page thumbnails and/or drag-and-drop. A page count option **1301** can be utilized to specify a page counter to appear on all or specified pages. Page count options can include choices such as 'Top Left,' 'Top Right,' 'Bottom Left,' and 'Bottom Right,' for example. Selecting the page count option **1301** can produce a field **1072** labeled (for example) 'Page Count' which can be dragged like any other field. Some embodiments may include page count options that include displaying the page number by itself, page number of total number of pages (*i.e.*, page x of y), first page different/omitted, etc. In response to selecting the show/hide field list option **1069**, a field list **1302** can be displayed. The field list **1302** may include a field search option **1304** along with a listing of selectable field types **1306** that can each include an expandable/collapsible listing of fields **1308** corresponding to their respective field types **1306**. For example, field types **1306** such as 'Client Contacts' and 'Diagnoses' are selectable, with 'Diagnoses' being selected/expanded to reveal fields **1308** such as 'Diagnosis Name,' 'Diagnosis Code,' and 'Diagnosis Name and Code.' Additionally, field properties **1310** relating to a currently selected field are also selectable. Additionally, some embodiments allow users to create new fields and/or field types in accordance with the field properties described herein.

FIG. **79** depicts options available on a currently selected (or hovered-upon) field **1072**, here the 'Client Signature' field. There are options to remove/delete the field **1312** from the current template and to copy/duplicate the field **1314**. Additionally, there is an option to display the field's properties **1316**.

FIG. **80** illustrates field properties **1304** that can be brought up by selecting a field's properties **1316**, as discussed above. Field properties can include general properties **1307**, such as field title **1308**, field position **1310** (which can be in x-axis/y-axis horizontal/vertical pixel coordinates, percentages, or any other suitable position/geographic measurement/indicator), field dimensions **1312** (height/width in pixels, percentages, or any other suitable unit of measurement/distance), field font size **1314** (*e.g.*, really small, small, normal, large, really large, and/or numerical values), field required flag **1316** (for example, see required field notice **1067** in FIG. **72**), an option to copy the field to supplemental pages in the template **1318** (which can include some, all, or specified pages in some embodiments), and team note text **1011** (which can be in the form of a customized comment field in some embodiments). Field options **1319** can include, for example, a character limit **1320** (with an option to specify no limit).

FIG. **81** further illustrates field properties **1304** for a currently selected field **1072**. Recipient options **1322** can include a recipient field indicator **1324** which can allow a user to specify which user-type role(s) **1326** (such as clinician, physician, vendor, client, etc.) will be able to view the instant field (and/or any contents) upon receipt of the template. In some embodiments, a user of the selected role type will see a placeholder for the field, such as the field title **1308**, and not the field's contents, with users of non-specified role types not seeing any indication of the field. Specifically, if a recipient user not of the specified role type(s) **1326**, they will not be able to see/utilize/complete the instant field. In some embodiments, if a recipient user is not of the specified role type **1326**, they may see a placeholder/generic indicator of the field but not its contents. Another recipient option **1322** is a recipient note **1328** that can be in the form of a customized comment field in some embodiments, wherein only the specified recipient will be able to see the recipient note **1328**.

FIG. **82** depicts a template preview, which can correspond to the template preview option **1092** in FIG. **81**. Here, the page count field **1301** is displayed as text indicating the location it will appear in on a rendered version of the instant previewed template. Similarly, field titles **1330** representing company name and address information fields, along with a vendor signature field, are displayed. Another field, 'Relationship to Beneficiary,' is displayed in the template preview in a form that accepts textual input **1331**.

Here, the user has entered the text 'test' into the 'Relationship to Beneficiary' field in the template preview. This provides the user with a view of what this field will look like for the intended recipient (or other users of the specified role-type in some embodiments). The text (here 'test') entered into the template preview of the textual input field **1331** has not yet been saved, although some embodiments can record a log of template preview textual entries for each textual input field **1331**.

Returning to FIG. **67**, selecting the secure send option **1018** can bring up a secure send interface as depicted in FIG. **83**. This secure send interface allows a user to select a recipient **1334** (other embodiments allow a recipient to be entered manually and/or select/enter multiple recipients), specify a deadline date **1336**, enter a secure message subject **1338**, and enter secure message text **1340**, which in some embodiments can utilize a custom comment field interface. Additionally, templates within a listing, associated with the instant workflow, are selectable **1342** with each template's name **1344** and with a number of signatures needed **1346** being displayed for each template. Additionally, there can be an option to set the user's signature **1348** to a template. Some embodiments allow users to set signatures for any user within the chain of delegation. Templates having fields requiring completion by the instant user (prior to the secure send) may cause the display of a pre-send required field notification **1350**, which indicates the quantity of required fields remaining before a template can be sent. Some embodiments utilize a recall-message feature to remove note/message from the recipient's inbox (which may or may not be restricted based upon whether the note/message has already been read/accessed). In some embodiments this required field notification **1350** can be satisfied by utilizing the option to set the user's signature **1348** to that template. Some embodiments allow templates needing signatures from other role-types to be sent, wherein such signatures can be completed later. Some embodiments can loosen signature restrictions based upon time-based thresholds with respect to the deadline of a template and/or workflow. When the selected templates are ready, a secure message can be sent **1352** to the selected recipient **1334** including a date needed **1336**, a subject **1338**, message text **1340**, and all selected workflow templates **1342**.

FIG. **84** shows a sample email as viewed by the designated recipient. The secure email contents **1354** include, for example, the recipient's name, the sender's name, the deadline date (date needed), the request expiration date, the templates accompanying the request, and the number of signatures needed for each template. The secure email can also include an indicator (link, icon, button, etc.) that leads the recipient to log in to their own account (or to create a new account) to begin working on the request described in the secure message. In this embodiment, the associated documents are not attached to the secure message, but are instead accessible only after the recipient logs into their account (clinician, physician, vendor, client, etc.). Other embodiments can send the associated documents as attachments within any type of appropriate, secure communications system (such as a secure email system).

Returning to FIG. **67**, selecting the send fax option **1020** can bring up a send fax interface as depicted in FIG. **85**. This send fax interface can provide options to select an outbound fax number **1358**, in accordance with an outbound fax number being associated with a user account, branch, company, etc. In some embodiments, an outbound fax number can also be manually entered. A fax recipient **1360** can be selected from users associated with the instant workflow, with one or more users (each with an associated fax number) being listed per role where available. In some embodiments, an e-fax number, email address, or other communications interface can be used to send/receive a fax and/or e-fax, which may also utilize encryption. A new recipient can be added **1362**, which can entail adding the recipient's contact information **1364**, including their name, phone number, and fax number. Cover sheet notes **1366** can be added (which in some embodiments utilizes a customized comment field) with an option to include recipient notes on a fax cover sheet **1368**. Additionally, templates in a listing associated with the instant workflow are selectable **1370** with each template's name **1372** and number of signatures needed **1374** being displayable for each template. Additionally, there can be an option to set the user's signature **1376** to a template. Templates having fields requiring completion by the instant user (prior to being faxed) may cause the display of a pre-send required field notification **1378**, which indicates the quantity of required fields remaining. In some embodiments this required field notification **1378** can be satisfied by utilizing the option to set the user's signature **1376** to that template. When the selected templates are ready, a fax can be sent **1380** from the selected recipient's fax number **1358** (or other appropriate information in other embodiments) with all selected workflow templates **1370**. Some embodiments can include a date needed, a subject, and/or fax message text. Some embodiments can utilize optical character recognition (OCR) for faxes and/or scanned documents. Any suitable OCR techniques can be utilized, such as intelligent character recognition, intelligent word recognition, pre-processing, and/or post-processing, wherein any implementation may use a neural-network (which can be limited to the systems described herein or encompass external systems as well) implementation to improve OCR accuracy with time and usage. OCR pre-processing techniques used in embodiments can include de-skewing (automatic rotation of a tilted image/fax), layout analysis (such as columns of text), and/or binarizing/despeckling (which can remove noise and/or pixelation commonly associated with lossy compression techniques such as JPEG compression), to help isolate individual letters and their constituent lines/curves). OCR post-processing techniques utilized in embodiments can include, for example, constraining by lexicon (such as a list or dictionary of known/expected words/characters) and/or near-neighbor analysis (probability-based analysis to determine which possible OCR matches are more likely to be correct). For example, utilizing a neural-network implementation as described above, any suitable algorithm can be utilized, such as the k-Nearest Neighbors algorithm, wherein an analyzed object can be classified according to its closest neighbors that themselves were obtained from previous classification iterations. Any resulting faxed or scanned document can utilize a searchable/selectable/editable textual representation within the document, wherein questionable OCR results can automatically be flagged (similar to how a spell-check program flags mistakes).

Continuing with the workflow template management interface discussed above with respect to FIGS. **67-68**, a template request **1038** is depicted in FIG. **86**. By expanding the collapsible template requests interface (some embodiments do not utilize a collapsible interface), a record is displayed for each template request with a recipient name **1382**, a template request status **1384**, the number of templates in the template request **1386**, a template request creation timestamp **1388**, an ability to recall the template request **1390** from the recipient, and an option to show/hide the template list **1392**. By showing the template list **1392**, each template's name **1394** and status **1396** are displayed.

Fax requests **1039** are also displayed in a collapsible interface (although some embodiments do not utilize a collapsible interface). A record is displayed for each fax request with a recipient name/fax number **1398**, a fax request status **1400**, the number of templates in the fax request **1402**, a fax request creation timestamp **1404**, and an option to show/hide the template list **1406**. Some embodiments can utilize an ability to recall the fax request from the recipient in an e-fax setting. By showing the template list **1406**, each template's name **1408** and fax count **1410** are displayed. Some embodiments can display a template status indicator.

Returning to FIG. **67**, selecting the upload signed copy option **1022** can bring up a signed template copy upload interface as depicted in FIG. **87**. This signed template copy upload interface can present the subject's name (such as a client's name) **1412** and the name of the template being uploaded (or other identifier) **1414**. In some embodiments, the subject's name **1412** and/or template's name **1414** can be selectable or may be manually entered. A signed-by field **1416** can be presented to users associated with the instant workflow (such as one or more clinicians, physicians, vendors, clients, etc.). A standard browse and upload interface **1418** can be utilized, as can any other appropriate type of upload interface. When ready, an upload confirmation indicator **1420** can either be presented at all times, or after completion of required fields in the instant interface.

Returning to FIG. **67**, selecting the remove option **1024** can bring up a deleted items interface as depicted in FIG. **88**. This deleted items interface can present records of deleted items that include, for example, the item's name **1422**, the item type **1424** (such as a template set, template, workflow, or rendered document template), the deletion timestamp **1426**, and an item restoration option **1428**.

Selecting 'My Database' from the heading links **100** discussed above can bring up a My Database interface, an example of which is illustrated in FIG. **89**. Template management can include template management options **1430** and template set management options **1432**. Lookup information can include item management options **1434** relating to primary items and additional items, item kit management options **1436**, diagnosis management options **1438**, insurance provider management options **1440**, resource and research management options **1442**, and workflow note categories management options **1444**. Contact options **1446** can be utilized for any role (clinician, physician, vendor, client, etc.). Custom text options can include previous item comment and spec sheet comment management options **1448**, letter closing text management options **1450**, and attestation text management options **1452**.

FIG. **90** is a flowchart depicting exemplary functionality of a template editor interface. In **1500**, a template can be added to and/or removed from any number of template sets. In **1502**, template modification options can include template title, template upload doc, template field font size, template page count placement, template team notes, template recipient instructions, template HCPCS code(s) (use template for all items, specified codes, or exclude codes), template fax cover sheet flag, template compliance doc flag, and template insurance (n/a, any insurance, selected insurance) options, for example.

FIG. **91** illustrates an exemplary template listing management interface, which can correspond to the template management options **1430** discussed above, and is presented here as a corresponding selectable tab **1430**. Options include adding a new template **1600**, a template search option **1602**, template viewing criteria **1604** (such as enabled, disabled/hidden, or all templates), and a listing of template records. A template records listing can include a template name **1606** and a show/hide template option **1608**, which in this example makes the template name **1606** appear greyed-out when the hide option (here indicated by an 'X') is selected. A template favorites indicator **1610** can be selected, along with template options **1612**, which can include a template editing option **1614**, template builder options **1616** (which can utilize, for example, any embodiment of the template builder interface discussed above), a template download option **1618**, a clone/copy template option **1620**, and a template deletion option **1622**, which in some embodiments can be restricted based on various criteria. Templates in this interface are not necessarily affiliated/assigned to any particular workflow(s).

Selecting the template editing option **1614** can bring up a template management interface as depicted in FIG. **92**. Template information **1624** (template title, file name, template field font size, template page count options (none, top left, top right, bottom left, bottom right, with some embodiments including 'page x' and/or 'page x of y' options), recipient instruction text, fax cover page options (yes/no), compliance document options (yes/no, collected once per client in some embodiments), item/HCPCS code options (include all items, include/exclude certain codes), and insurance relation options (none, any, or selected/specified insurance provider(s))) can be edited **1614**, or the template can be brought up in any embodiment of the template builder interface discussed above.

Further options can include set assignments, where the instant template can be removed **1620** from a template set to which it currently belongs **1618**. Additionally, the instant template can be assigned to a template set to which it has not been assigned **1622**. A template can belong to any number of template sets, although some embodiments can limit/restrict access to which template sets a user can assign a template and/or have access, which can be affected by their account. QA template items can be disabled **1624**, edited **1626**, removed **1628**, and reordered **341**, with a QA description **1623** provided for each QA item. QA item text **1630** can be utilized to create a new QA item **1632**, wherein a customized comment field can be utilized.

Returning to FIG. **91**, selecting the add new template option **1600** can bring up an add template interface, such as the depiction in FIG. **93**. A template title **1634** can be added, with a browse/upload option **1636** (or any other suitable type of upload interface). When ready, a template upload confirmation indicator **1638** can be utilized either at any time, or once for validation criteria have been satisfied.

FIG. **94** is a flowchart depicting a template set interface. In **1700** a listing of template sets can be viewed, which in **1702** can lead to options to create/edit a template set name and workflow type. In **1704** templates can be added to, edited within, and removed from the instant template set. In **1706**, object-based template set trigger conditions can be enabled, edited, and disabled. Template set trigger conditions can be based on objects such as include insurance providers, diagnoses, and item types (HCPCS code, item name, manufacturer), for example. Any template in the template set can be opened within the template editor interface **1708** (discussed above) and/or the template builder interface **1710** (discussed above).

FIG. **95** illustrates an example of a template set listing management interface, which can correspond to the template management options **1432** discussed above, and is depicted here as a corresponding selectable tab **1432**. An option to add a document set **1800** can bring up an interface, as illustrated by FIG. **96**. A template set title can be entered (or selected in some embodiments) with a workflow type being entered or selected (*e.g.*, basic order, complex rehab workflow, general document workflow, seating and evaluation, specification sheet assessments, repairs, respiratory, and O & P (orthodontics and prosthetics)). An add template set indicator **1804** can be either always available or be subject to form validation criteria.

Returning to FIG. **95**, document templates in this interface are not necessarily affiliated/assigned to any particular workflow(s). Template sets are listed and can be filtered according to workflow type (such as basic order, complex rehab workflow, general document workflow, seating and evaluation, specification sheet assessments, repairs, respiratory, and O & P). Template set records can display each template set's name/title **1806**, workflow type **1808**, number of assigned/affiliated templates **1810**, whether to show/hide the template set **1812** (which in this example makes the template name **1806** appear greyed-out (note shown) when the hide option (such as an 'X') is selected), a template set favorites indicator **1814** (such as a star), and a deletion option **1816**. In some embodiments, a template set restoration option can be used to restore a template set that was previously deleted.

Selecting a template set **1806** can bring up a template set management interface, as illustrated by example in FIG. **97**. The template set's info **1806** (such as title and workflow type) can be edited **1808**. A listing of the template set's templates can be presented with records displaying each template's title **1606**, with a template editing option **1614**, template builder options **1616** (which can utilize, for example, any embodiment of the template builder interface discussed above), and a template deletion option **1622**, which in some embodiments can be restricted based on various criteria (such as a 'system'-type template indicator next to some template titles that inactivates options to utilize a template builder and/or remove the template from the template set). Some embodiments may include a template download option and/or an option to clone/copy the template. There can also be an option to select a template for assignment to the instant template set **1810**, or in some embodiments, search for an item utilizing any search techniques described herein.

Template set assignment conditions can also be presented, with options to change assignment conditions **1812** and/or disable assignment conditions **1814**. A listing of a template set's assignment conditions can display, for each assignment condition, insurance provider conditions, diagnosis conditions, and item conditions, for example.

FIG. **98** is an example of an insurance object trigger interface. Here, the various trigger type conditions (insurance, diagnosis, item, etc.) are each part of the same trigger. Some embodiments may treat each trigger type as its own discrete trigger, independent of other trigger types. An insurance provider can be searched **1822** (or entered/created in some embodiments) and selected. Any number of insurance provider objects can be utilized for a given trigger. Two insurance providers are listed as current insurance provider triggers **1824** with options to remove each as a trigger. Some embodiments may have an option to clear all insurance provider trigger choices at once. Navigation options **1826** include moving to the next trigger (if available as an option) and going back to the previous trigger (if available as an option). At any time a trigger can be saved **1828**, although some embodiments may utilize form validation to restrict access to the save option **1828**. Some embodiments can display a listing of all insurance objects and allow selection and/or drag-and-drop to select/deselect insurance objects.

FIG. **99** is an example of a diagnosis object trigger interface. A diagnosis can be searched **1830** (or entered/created in some embodiments) and selected. Any number of diagnosis objects can be utilized for a given trigger. As illustrated, three diagnoses are listed as current diagnosis triggers **1832** with options to remove each as a trigger. Some embodiments may have an option to clear all diagnosis trigger choices at once. Some embodiments can display a listing of all diagnosis objects and allow selection and/or drag-and-drop to select/deselect diagnosis objects.

FIG. **100** is an example of an item object trigger interface. An item search criteria type **1834** (*e.g.*, item/HCPCS code, item name, manufacturer) can be selected. Based upon the item search criteria type selected **1834**, an item can be searched **1836** (or entered/created in some embodiments) and selected according the selected criterion (or any other appropriate criteria), here the manufacturer name. Any number of item objects can be utilized for a given trigger. Two items are listed as current item triggers **1838** with options to remove each as a trigger. Some embodiments may have an option to clear all item object trigger choices at once. Some embodiments can utilize all or some of the features of the item adding interface described above. Some embodiments can display a listing of all item objects and allow selection and/or drag-and-drop to select/deselect item objects.

FIG. **101** further depicts the template set management interface embodiment from FIG. **97**. The new/updated insurance providers **1816**, diagnoses **1818**, and items **1820** are now reflected in the instant trigger record. An occurrence of any of these insurance provider objects **1816**, diagnosis objects **1818**, or item objects **1820** can trigger the appending of all the templates in the instant template set to the workflow to which these workflow objects (*e.g.*, insurance providers **1816**, diagnoses **1818**, and items **1820**) belong. In some embodiments, triggers can also be utilized in the same manner for each template, irrespective of whether a template belongs to any template sets. In some embodiments, when a template set is appended to a workflow (such as by satisfying one of its triggers), this can cause a check to be conducted, which can prevent the appending of any of the template set's templates that are already in the instant workflow.

In some embodiments, template set (or template) triggers are compared continuously (substantially in real-time/live) or periodically, wherein the frequency/periodicity of such checks can be user and/or administrator defined. In some embodiments, if none of a workflow's objects satisfies any of a template set's trigger conditions, the template set's templates are removed from the instant workflow, as they are no longer needed. Similarly, in some embodiments, if none of a workflow's objects satisfies any of a template's trigger conditions, the template is removed from the instant workflow, as it is no longer needed.

Returning to FIG. **89**, selecting item management options **1434** (relating to primary items and additional items) can bring up the exemplary global item listing management interface depicted in FIG. **102**, with such options being presented here as corresponding selectable primary and additional item tabs **1434**. Reviewable items can be restricted with respect to the instant user's/administrator's profile (*i.e.*, the user/administrator cannot view/edit items whose permissions restrict access, based on rights associated with the user's/administrator's profile, to the item's access rights, or both) in some embodiments. In other embodiments, a user/administrator may have unfettered access to all items. As shown, a new item can be added **1840**. An item listing can be filtered **1842** by any suitable criterion, such as item category. Item categories can include, for example, all items, power wheelchair, manual wheelchair, scooter/power operated vehicle (POV), gait trainer, stander, adaptive tricycle, position chair, bath chair, toileting system, patient lift, adapted bed, bathroom equipment, or other equipment, which can serve as a miscellaneous category, or (in some embodiments) generate a prompt to create a new equipment item category.

Items can also be searched **1844**, with search suggestions and/or search results being made in some embodiments based on each character received (as discussed above). Any search interface described herein can utilize auto-complete search suggestions, which can be based on frequently or recently used queries or from external data sources/databases such as BRIGHTREE®, or be based on web-based data, wherein such auto-complete suggestions and/or search results can be utilized across all users/administrators or restricted to a particular user account and/or role. Each item record can display the item name **1846** (with some embodiments denoting stock items, such as with bold font), item/HCPCS code **1848**, an item show/hide option **1850** (which in this example can make item names **1846** appear greyed-out if the hide option (such as an 'X') is selected), and an item edit option **1852**.

Selecting an add new item option **1840** or edit item option **1852** can bring up an item management interface as illustrated in FIG. **103**. Here, an item name **1856** and an item/HCPCS code **1858** can be entered (or selected in some embodiments, such as re-using the name of a previously-deleted item). An optional (or mandatory in some embodiments) item description **1860** can be entered, which in some embodiments utilizes a customized comment interface (wherein some embodiments may use an interface similar to that depicted above for FIG. **64**). An item can be assigned to one or more item categories **1862**, along with an option to associate the item with the instant user's/administrator's item list **1864**, where unchecking this option can unassociate the item from all categories. An update/create option **1866** can be utilized at any time (or be subject to from validation requirements in some embodiments). Additionally, a history option (not shown) allows an audit-type view of the item, an example being described above with respect to FIG. **31**.

Continuing with the item management interface, FIG. **104** provides an item note text option **1868** that utilizes a customized comment field. Item justifications can display a title **1870**, utilize an edit option **1874**, and may have a preview option **1871** that can display the item's justification text **1872**. There can also be options to make the current item justification text **1872** the default item justification **1876** (which can be deactivated in some embodiments), and to copy and create a new item justification from the current item justification text **1878**. Additionally, an item justification title text field **1880** is presented, along with an embodiment of a customized comment field **360** for the new item justification, and an option to add the new item justification **1882**.

Returning to FIG. **89**, selecting item kit management options **1436** can bring up an item kit management interface such as depicted in FIG. **105**, which are presented here as a corresponding item kit tab **1436**. The item kit's info **1884** (such as kit title, favorite status (yes/no), enabled (yes/no)) can be edited

1886. A listing of the item kit's constituent items can be presented with records displaying each item's title **1888**, and an item deletion option **1890**, which in some embodiments can be restricted based on various criteria (such as the 'system' indicator next to some items that inactivates options to remove the item from the item kit) and/or role-based restriction. Some embodiments may include an item download option and/or an option to clone/copy the item. There can also be an option to select an item for assignment to the instant item kit (not shown) based upon an item search option **1892**, which can utilize any search techniques described herein.

Returning to FIG. **89**, selecting diagnosis management options **1438** can bring up a diagnosis management interface as shown in FIG. **106**, which can allow global (or group and/or role-based) management of available diagnoses. An option to add a new diagnosis **1894** can be utilized, along with a diagnosis search option **1896**, which can utilize any search options discussed herein. Each diagnosis record can be displayed by diagnosis name **1898**, diagnosis acronym **1900**, diagnosis code **1902**, and show/hide flag/option **1904** (wherein access to making/viewing modifications can be restricted in some embodiments). Each diagnosis record can be displayed in view mode **1908** (with an option to view an audit history **1906**) or edit mode **1910** (with an option to update the diagnosis record **1912**).

FIG. **107** depicts an example of a diagnosis record audit interface. An audit record **1914** here is shown as a result of selecting the audit history option **1906** of a viewed diagnosis record **1908** in figure **106**. Some embodiments include options to view all data associated with a diagnosis record, such as clients, workflows, equipment, insurance providers, and any other data with which a diagnosis record can be utilized/analyzed.

Returning to FIG. **89**, selecting insurance provider management options **1440** can bring up an insurance provider management interface as shown in FIG. **108**, which can allow global (or group and/or role-based) management of available insurance providers. An option to add a new insurance provider **1916** can be utilized, along with an insurance provider search option **1918**, which can utilize any search options discussed herein. Each insurance provider record can be displayed with an insurance provider name **1920**, an insurance provider number **1922**, an insurance provider fax number **1924**, and a show/hide flag/option **1926**. Some embodiments utilize an insurance provider email address. Each insurance provider record can be displayed in view mode **1930** (with an option to view an audit history **1928**) or edit mode **1932** with an option to update the insurance provider record **1931**.

FIG. **109** depicts an example of an insurance provider audit interface. Audit records **1934** here are shown as a result of selecting the audit history option **1928** of a viewed insurance provider record **1930** in figure **108**. Some embodiments include options to view all data associated with an insurance provider record, such as clients, workflows, equipment, diagnoses, and any other data with which an insurance provider record can be utilized/analyzed.

Returning to FIG. **89**, selecting resources and research options **1442** can bring up a resource search interface as shown in FIG. **110**. Resources can be any information in any form, such as a hyperlink or file. Resource options **1936** can include, for example, options to search for a resource, to access the user's own resources (*e.g.*, 'my resources'), and to add a resource. A resource search option **1938** can utilize any search techniques discussed herein. Search features **1940** can include searching within a user's account, or globally across all user accounts, as well as searching the web via internet search engines. Some embodiments can include searching capabilities linked to external data sources/databases, such as BRIGHTREE®, where searches may be specific to data within a user's account in such external data sources/databases, or searches may be global within such external data sources/databases. A search confirmation indicator **1942** may be utilized to search. Alternatively, a user can utilize/select search suggestions **1944** as well as the user's own recent searches **1946** and/or associated search results (not shown), any of which may be cached for quick retrieval.

FIG. **111** displays an example of a resource search results interface. Search results **1948** can be displayed with a web link anchor text, a visible URL (uniform resource locator), an option to visit the URL **1947**, and/or an option to view comments **1949** regarding the resource. Some embodiments can have resource rating options (with rating being obtained from the instant user and/or other users) and/or resource thumbnail/preview options. Additionally, a new resource can be added **1950**.

FIG. **112** displays an exemplary resource management interface, which can correspond to the 'my resources' tab within the exemplary selectable resource options **1936**. A user can search for their previously saved resources **1952** (utilizing any search techniques described herein), which can include resources related to their instant account, branch, and/or company, as well as data from the internet. As discussed above, resources can also be obtained from external data sources/databases. Each resource record **1953** can be displayed with the resource name **1954**, the resource URL **1956** (if applicable), and a creation timestamp **170**, for example. Some embodiments can also use an audit history regarding a resource and/or display rating information from the user and/or other users. Additionally, an option can be presented to add a new resource **1950**.

FIG. **113** depicts a sample resource creation interface, which can be utilized as a result of the add a new resource option **1950** discussed above. Here, a resource can be given a title **1958** and a URL **1960**, with a form validation option to test the entered URL **1961**. The URL **1960** must be deemed valid prior to being added as a resource, but some embodiments may not require such URL validation. In some embodiments, links can be periodically checked/validated, with outdated links being flagged/removed even though they were previously valid. A customized comment field can be utilized to create the resource description **360**, although some embodiments can utilize regular text. Text editing options **324** can also be utilized. There can also be fields to enter the item(s) **1962** and diagnosis(es) **1964** to which the resource relates. Some embodiments can also include fields for related insurance providers. When complete, the resource can be added **1966**.

Returning to FIG. **89**, selecting workflow note categories **1444** can bring up a resource search interface as shown in FIG. **114**. An option can be presented to add a new workflow note category **1968**, along with displaying a record for each workflow note **1975**. Each workflow note record **1975** can be displayed with an edit option **1974**, a delete option **1976**, a category name **1970**, and a show/hide option/status **1972**, which can be restricted to view-only based on any suitable and/or specifiable criteria. Timestamp and audit options can be presented in some embodiments.

Returning to FIG. **89**, selecting workflow note categories **1446** can bring up a vendor (or any other account-type) accounts listing management interface as shown in FIG. **115**. Here, vendor (depicted as rehab technology suppliers, or rts) accounts were chosen, although the instant interface can apply to any other account type (clinician, physician, client, etc.). Account management options **1978** can include viewing existing accounts and creating a new account. Such options may be utilized by administrators or users, such as users designated within a company or branch to have account creation/modification/deletion rights. Here, an account search option **1980** is presented to search for vendor accounts, although some embodiments can have a role-type selection option as a search criterion. The account search option **1980** can utilize any search features and/or account information described herein. Each vendor account record **1981** can display a username **1982**, account status **1984** (such as active or invited), account credentials **1986**, account phone number **1988**, account fax number **1990**, an account edit option **1992**, and an option to send a message to the account **1994**. Some embodiments can also utilize an account email address. Accounts not having an active status **1984** can display an option to re-invite the account to become active **1985**, which can be performed by any suitable notification type (such as electronic message and/or email, for example). Some embodiments can also present an account deletion option. An option to add a new vendor account **1996** (or any other account type) can be utilized as well.

Utilizing the add new vendor option **1996** or selecting the 'add a new rts' account management options tab **1978** can bring up an interface as depicted in FIG. **116**. Account information fields **1998** (*e.g.*, name, credential(s), phone/fax numbers, email address) and an add account option **2000** are presented.

Returning to FIG. **89**, selecting comment and spec sheet comment management options **1448** can bring up a previous item comment management interface as shown in FIG. **117**. Alternate comments for previous items can have an entered/selected/suggested title **2002**, with text editing options **324** that can be presented with a customizable comment field **360** (other text entry options can also be utilized) having an update option **2004**. Stored previous item comment records **2005** can have a preview option **2006** (such as the preview text **2012** displayed for another item comment record), an edit option **2008**, a displayed title **2010**, and an option to copy and create an alternate previous item comment **2011** (which can require its own comment title **2014** in order to save/add as a new/alternate comment **2016**). An option to add a new alternate comment **2018** is presented as well. Some embodiments can utilize any features associated with any description of a customized comment field as described herein.

Returning to FIG. **89**, selecting letter closing text management options **1450** can bring up a letter closing text management interface as shown in FIG. **118**. Existing closing text comments **2020** can include a closing text comment preview option **2022** (as shown by closing text body **2028**) and an edit closing text comment option **2024**, along with a closing text comment title **2026**. Additionally, there can be options make the instant closing text comment the default closing text **2020**, as well as to copy and create a new/alternate closing text comment **2032**. A new/edited closing text comment can have a title field **2034**, along with text editing options **324** and a customized comment field **360**. An add closing text comment option **2036** can also be utilized. Some embodiments can utilize any features associated with any description of a customized comment field as described herein.

Returning to FIG. **89**, selecting attestation text management options **1452** can bring up an attestation text management interface as shown in FIG. **119**. Such attestation text can be used above a signature (such as a clinician's signature) associated with an account, wherein the some embodiments can apply to different account types. Text editing options **324** can be presented with a customizable comment field **360** (other text entry options can also be utilized) along with an option to create/update the account's attestation text **2038**.

FIG. **120** depicts a client search interface (such as client interface options **300** in FIGS. **27-28**) having a client search field **2040** (that can utilize any search options described herein) with an option to clear search text **2041**. Client records **2042** that match whatever text has been entered in the client search field **2040** can be displayed in real-time as search text is entered (not shown), or upon receiving a search confirmation input **2040**. Each client record **2042** can present, for example, the client's name **2044**, the client's gender **2046**, the client's date of birth (DOB) **2048**, and client contact info **2050**. Additionally, each client record can have client record actions **2052** that may include viewing the client record **2054**, editing the client record **2056**, viewing the workflows associated with the client **2058**, viewing photos associated with the client **2060**, and viewing notes associated with the client **2062**.

Returning to the exemplary home interface depicted FIG. **7**, a client search field **112** can bring up a client search as shown in FIG. **121**. Client records **2066** that match whatever text has been entered in the client search field **112** can be displayed in real-time as search text is entered, or upon receiving a search confirmation input (not shown). Each client record **2066** can present an option to be selected **2068**.

FIG. **122** depicts an inbox interface having inbox options **2070** that can (for example) include a message (*e.g.*, e-message, fax, etc.) inbox (depicted), a notifications tab (which can correspond to the notifications **138** as shown in FIG. **8**), a compose new message option, a view sent messages option, and a view deleted messages option. The compose new message option can utilize a customized comment field or any other appropriate text interface, and can include recipient search options (implemented using any search techniques discussed herein), a subject, and file attachment options. The depicted message/fax inbox of the exemplary inbox interface can include message search options **2072** which can be implemented using any techniques discussed herein. Message selection options **2074** can include marking a message as read, marking a message as unread, flagging a message for deletion, copying and/or forwarding, as well as a check-all/none master checkbox. A view-all/close-all pages option **2076** can be utilized to display all messages (on a given page of viewable messages) in either a preview view that displays message document thumbnails **2082** or a closed (compact) view. Message sorting options **2078** can include message subject, message sender, and a receipt timestamp **170**. Message action options **2080** can include viewing the instant message, marking the message as read, marking the message as unread, and deleting the instant message. Message action options **2080** can further include attachment options such as viewing, downloading, and deleting an attachment associated with the instant message.

FIG. **123** depicts a workflow management interface that can include options to search existing workflows (an example being depicted in FIG. **7**), import a workflow, and start a new workflow (an example being depicted in FIG. **43**). Options for importing a workflow can be accomplished, for example, by importing a sales order **2086** and/or importing a client **2088** from or other data sources or external databases, such as BRIGHTREE®. The workflow management interface can restrict workflows shown according to workflow type, such as complex rehab workflows, basic orders, general document workflows, specification sheets, assessments, repairs, respiratory, and O & P.

Some embodiments utilize workflow templates that can serve as the basis of any number of workflows, wherein such workflows can then be customized (after being generated based on a workflow template). For example, workstates, steps, tasks, teams, team members/users, triggers, client assessments, equipment, and/or client measurements can be used to build a workflow template. A workstate can comprise steps, which in some embodiments can be a series of linear dependencies/requirements, whereas there can be interdependencies among steps in other embodiments. Further, in some embodiments, a step can comprise one or more tasks. In some embodiments, tasks can include, for example, obtaining a signature, verifying data, and/or sending a form/template. Each constituent part of a workflow template can have an associated temporal component (time limit/tracker). In other embodiments, any workstate can comprise one or more tasks without utilizing steps. The terms 'form' and 'document' can be utilized interchangeably throughout.

In some embodiments, each workflow template can have triggers, of which one or more must be satisfied to utilize the workflow template to serve as the basis for the instant workflow. A workflow template can be selected/de-selected automatically in some embodiments as the underlying data associated with the instant workflow changes. In one example, having a certain insurer, diagnosis, piece of equipment, client, etc., can cause a workflow template to be utilized or removed (if the workflow and/or workflow template no longer satisfies required trigger(s)). In some embodiments, each workstate and/or workstate template can have triggers, of which one or more must be satisfied to utilize the workstate template to serve as the basis for the instant workflow, whether or not a workflow template serves as its basis. In some embodiments, a given workflow template, workstate, or workstate template can be a subset of another respective workflow template, workstate, or workstate template. Despite the inherent overlap among a subset and a set (such as for triggers, for example), they can be treated as mutually exclusive for selection purposes, such that satisfying a trigger only present in the set (*i.e.*, the larger workflow template, workstate, or workstate template) can automatically remove the subset (*i.e.*, the smaller workflow template, workstate, or workstate template), even though it is still satisfied, and vice versa. For example, removal/dissatisfaction of any triggers that previously satisfied the set (but not the subset) can cause the subset to suddenly be utilized, as the subset was not previously utilized (even though the subset was already satisfied).

Some embodiments can utilize workstates to measure progress towards completing a workflow. Workstates can include tasks (whether or not delegated) to be completed, documents to be completed, appointments (such as client evaluations) to be completed, which role(s)/account(s) have been assigned to a task, the task's deadline for completion ('get it done by' date), and the next work-in-progress state. A workflow can thus be mapped out as a series of interdependencies/workstates in any manner, such as visually in a graphical dashboard interface.

A workflow template can have one or more workstates, wherein some embodiments require one workstate to be completed before beginning another workstate. For example, a workflow template can require: workstate 1 must be completed prior to beginning workstate 2, workstate 2 must be completed prior to beginning workstate 3, and so on. Each workstate can have/require one or more steps. For example, steps 1-3 in workstate 1 may require completion prior to moving on to workstate 2. Other embodiments, however, may permit another workstate to begin upon completion of steps within a prior workstate. For example, step 3 in the workstate may be optional (or at least may not be as time-sensitive as other steps, wherein step 3 with a deadline extending beyond the start time of a subsequent workstate in some embodiments). In such a scenario, as long as steps 1 and 2 are completed within workstate 1, then workstate 2 could begin even before workstate 1 would be completed.

A step may comprise one or more tasks, such that a step may only be completed once some or all of its constituent tasks are completed. For example, before proceeding to step 2 within workstate 1, tasks 1-3 in step 1 may require completion. Tasks may also be grouped within a step, such that all steps are being worked on simultaneously. Some embodiments can utilize, even within the same workstate, some steps that require linear progression through their constituent tasks, with other steps permitting their constituent tasks to be completed in any order. Still further, some steps may have only certain task restrictions (task 4 cannot begin until task 2 is complete, with no bearing on any other task within the step). For example, task 1 of step 2 may have a dependency that requires tasks 1-2 to be completed first. Although step 1 may have its own time limit for completion of all its constituent tasks, step 2 may permit its task 1 to begin once tasks 1-2 have been completed (by the same or a different user) in step 1, even though subsequent tasks (tasks 3, 4, etc.) in step 1 have not been completed or even begun.

In some embodiments, users can be formed into teams. An administrator, supervisor, or any other appropriate user can manage teams (their creation, editing, removal, etc.), a team can be spread across branch locations, or limited to particular branch. Some embodiments can allow users to form their own teams, as well as request time off or block-off time (such as an upcoming vacation) so that teams and workloads can be recalibrated ahead of time, depending on varying availability of users. Depending on load-balancing and other factors, a user may belong to more than one team, although some embodiments may limit a user to only one team. A team can comprise roles, specific users, subgroups of users, or any combination thereof, wherein a user can have more than one role (even within the same team) in some embodiments. Some embodiments can also run conflict-checks regarding which roles a user can have (*e.g.*, being a member of role 1 may preclude a user from also having role 2, which could be due to a conflict of interest between such roles) or what teams a user can be a member of. For example, one team may specify user1, user2, and user3. Another team may specify any user having roles such as oxygen specialist, bed specialist, and wheelchair specialist. Yet another team may comprise: (a) user 1, (b) any user having the role of bed specialist, and (c) a member selected from a subgroup (user4, user5, user6). Some embodiments can permit specifying that a team member can have any of a plurality of roles, instead of just being limited to a single role, wherein some embodiments may permit an order of preference among a plurality of roles (and/or users), wherein such preferences can be manually specified or based on ratings information. Any criteria can be applied to groups, such as users meeting certain pendency/timeliness requirements, physical location, amount/level of experience, quality rating, probationary status, user/role/team workload/utilization (such as for load-balancing purposes). Users can also be assigned permissions, so that a team, step, and/or task can utilize only those users and/or roles having certain permissions.

In some embodiments, steps and tasks can be delegable, wherein such delegation may be required (workstates and/or workflow templates can store such delegation requirements). Once delegated, a pending task (such as completing required fields in one or more assigned document templates) can cause reminders to be sent to the delegator (and/or previous delegators) and/or the delegatee (and/or subsequent delegatees), to in order preemptively avoid bottlenecks/hold-ups in the workstate and/or workflow. For example, user1 may have a vendor-type account as a supervisor at a branch location of a company, who delegates two document templates (form1 and form2) in a workflow to a subordinate, user2 (either at the same or a different branch within the company). Each document template can have its own deadline date, along with the workflow having its own master deadline as well. User1 can receive notifications regarding each document template any time one is thereafter re-delegated, updated, completed, transferred, modified, or has any type of loggable/trackable event occur. Some embodiments permit users to specify which types of events (which can be customized for each form template type and field type as well) regarding a template document will trigger alerts to their accounts (or the accounts of others, such as subordinates/peers/superiors/delegators/delegatees/etc.).

Continuing with this example, user1 receives a notification that form1 has been sent to a physician's account (physician1) by user2, and that form2 has been sent/delegated to a clinician's account (clinician1) by user2. User1 receives notifications when physician1 completes their portion of form1. When Form1 is returned to user2 (after either passing form validation requirements or a notice that physician1 cannot complete form1), this causes notifications to user1 and user2, with user2 subsequently returning form1 to user1 (or form1 can automatically be returned to user1 upon satisfying or failing its present requirements), who can re-delegate form1 as necessary (such as to a peer, a supervisor, a different subordinate, or users having any appropriate role type). All document template transactions, such as delegation and completion, can appear in an audit option (discussed below), which can serve as the basis for customizable notifications. In some embodiments, any user can specify, customize, and modify the types of notifications they receive, as well as alert thresholds. Some embodiments allow users to specify whether a document template is delegable, to whom it is delegable, and delegation restrictive/permissive criteria (such as time, location, a minimum user rating that indicates promptness and/or trustworthiness ratings to filter the users to which delegation can be assigned (automatically or manually), wherein such ratings can be peer-based, etc.) User1 is alerted when form2 is delegated to a different physician account (physician2) after clinician1 completes their required portions of form2. Form2 may be have been delegated directly from clinician1 to physician2, or alternatively, clinician1 may have returned form2 to user2, who subsequently delegated it to physician2. Another possibility is that user1 or user2 may have set up a document template 'path' whereupon clinician1's completion of their portion(s) of form2, form2 is automatically forwarded from user2 to physician2, based on the preset path specified by user1 or user2. Such features are discussed in more detail below with respect to workstates and workflow templates.

Continuing with the instant example, user1 and/or user2 can be alerted when a deadline threshold, such as three business days (calendar days can also be specified, or any other unit(s) of time) until a deadline (regarding for form2, the workflow, and/or any interceding documents in the dependency chain) is reached. User1 can specify (in some embodiments) which types of alerts they receive, since a supervisor may not want preliminary warnings/status updates that are being handled by a multitude of reliable subordinates like user2. Some embodiments may remove a workflow/workstate from a user's list of tasks once that user has delegated all document templates in a workflow/workstate, wherein the workflow/workstate may be reappear on the user's list of tasks once a delegated task is completed. Further, any suitable type of graphical dashboard interface can be utilized to assist a user in tracking all their tasks and delegated tasks. Continuing with this example, form1 can have fields that are only viewable/editable by a clinician, as well as fields that are only viewable/editable by a physician. Some embodiments can permit access to such restricted fields to more than one role (such as by only either a physician or a clinician). Some embodiments may permit the specification of not only the role-type to which a field is visible, but also specified users within a role-type, such as specific clinicians or specific physicians. This may (but not necessarily have to) include clinicians and/or physicians associated with the instant workflow. Any such data can be stored in, for example, a workstate, workflow, workstate template, or workflow template.

Continuing with this example, if physician2 has forgotten about form2 and the deadline for form2 has elapsed (or exceeds any alert threshold, including warnings about approaching deadlines), notices (like overdue alerts) can be sent to all users affiliated with form2 (user1, user2, and physician2). Conversely, clinician1 would not be alerted in this instance, as they were not involved (yet or at all) with form2, even if their signature would be needed subsequent to physician2's signature or other input coming first in the chain of dependency). Moreover, some embodiments can restrict delegation authority based on role-type, company, and/or branch, as well as any rights associated with the user's account, branch, location, and/or any other criteria with which rights can be associated.

An example of a workflow and/or workflow template **3000** (either of which are termed a "workflow" for convenience in this non-limiting example) is provided in FIG. **124**. This workflow **3000** comprises three workstates **3002**, **3004**, and **3006**. Although these workstates are strictly linear in this example, in some embodiments they can overlap, such that not all steps and/or tasks within a workstate need be completed prior to the next workstate beginning. Some embodiments may permit users/administrators to specify overlapping exceptions to such a linear workflow nature. Other embodiments may accept input specifying dependencies and rules for some or every step and/or task within each workstate.

Within each workstate may be one or more steps that can each further comprise one or more tasks. One or more users (such as in a team) can be assigned to a workstate, a step, and/or a task. For example, within workstate 1 **3002**, there are steps A **3028** and B **3034**. Step A **3028** has two tasks, A1 **3030** and A2

3032, which both have a start time A **3010**, but with each task having a different deadline. Task A1 **3030** must be completed by time B **3012**, whereas task A2 **3032** must be completed by time D **3016**. As will be readily understood by temporal axis **3008**, time D **3016** is subsequent to time B **3012**, for example. Each task can be assigned to a role-type or a specific user. Some embodiments may permit users to submit requests that they receive (or be delegated/docketed) specific tasks and/or steps, and/or to see all/some available steps/tasks that meet a user's specified criteria from which they can select one or more steps/tasks. In some embodiments, a user can query available work for which they are qualified. Some embodiments may permit a user to see what types of work they would be eligible for after a promotion or assuming a new role/credential. Some embodiments may allow steps/tasks to be assigned to users in this way without requiring approval, or may allow certain users to be designated as not requiring approval based on any suitable criteria (such as seniority, performance ratings, etc.). Here, team A **3066** can either exist persistently or just for the duration of the specific tasks, steps, workstates, workstate templates, workflows, and/or workflow templates. Team A **3066** comprises a user of role-type A1 **3068** assigned to task A1 **3030**, which they must complete by time B **3012**. Team A also assigns a user of role-type A2 **3070** to task A2 **3032**, which has a completion deadline of time D **3016**.

Within workstate 1 **3002**, step B **3034** comprises task B1 **3036** having a completion deadline of time D **3016** and task B2 **3038** having a completion deadline of time C **3014**. Team B **3072** is assigned to step B **3034**. Unlike team A **3066**, which only requires users having certain user role-types (without specifying specific users, although specific user data is stored within the team and elsewhere), team B **3072** comprises specific users, with user B1 **3074** being assigned to task B1 **3036** and user B2 **3076** being assigned to task B2 **3038**. Some embodiments can permit alternate users to be designated in case the specified user is/becomes unavailable prior to or during the task/step/workstate/workflow. Some embodiments may permit selection of a specific group of users, who may or may not have membership with respect to a particular role (wherein some embodiments permit users in more than one role, or conditional membership wherein a user can temporarily have membership in a role, such as when the number of available users within a role drops below a certain threshold). Some embodiments can permit one or more users to be designated as being available to fill-in for spots on the team there are not enough users having a role-type available and/or not enough users within a role-type that meet minimum threshold measures (such as quality, timeliness, etc., wherein a task/step/workstate/workflow can specify that all/some users/teams/roles must (or at least should under normal circumstances) meet certain threshold criteria due to the importance of such a task/step/workstate/workflow).

Workstate 2 **3004** comprises step C **3040** and step D **3048**. Step C **3040** comprises task C1 **3042** having start time of time D **3016** and required completion time F **3020**. Some embodiments can designate a completion/start time D **3048** having a fixed date/time. Other embodiments may define time D **3048** to be the time at which all steps/tasks within workstate 1 **3002** are completed and therefore automatically starting the clock for tasks/steps in workstate 2 **3004** having a start time of time D **3016** (although a buffer of time can be specified/defined for time D **3016** as well, so that the clock starts on workstate 2 **3004**, for example, an hour after workstate 1 **3002** is completed, wherein this concept can apply to any dependencies or inter-dependencies described herein). Here, only tasks C1 **3042**, D1 **3050** and D4 **3056** start at time D **3016**. By contrast, tasks C2 **3044**, C3 **3046**, D2 **3052**, and D3 **3054** start later, and can, for example, start at a defined start time or start once another step/task has been completed.

Task C1 **3042** has a start time D **3016** and a deadline of Time F **3020**. Task C2 **3044** can begin at time F **3020** and have a deadline of time G **3022**. In some embodiments, task C2 **3044** can begin immediately once one or more tasks (such as task C1 **3042**) have been completed. Other embodiments can begin task C2 **3044** at a fixed time F **3020** even if task C1 **3042** has been completed prior to time F **3020**. Some embodiments can also include a "buffer" time which can require passage of a specified amount of time to pass once a step/task has been completed until another step/task can begin. Some embodiments can utilize combinations of dependencies, fixed beginning times, and/or buffers. A buffer can also be a minimum/maximum amount of time, subject to when the prior step/task is completed, relative to the next step/task. There can also be deviation from a default buffer value. For example, a buffer (of a day, for example) can be applied if the first step/task is completed more than one day prior to a defined start time of another step/task, but if the first step/task is still pending or completed with less than the buffer time (a day), then the buffer does not apply and the other step/task can begin immediately or at its default scheduled start time. In some embodiments, a later-starting task like C2 **3044** can similarly depend on the completion of steps in another task, such as task D2 **3052**, which itself may or may not depend upon completion of task D1 **3050**. Task C3 **3046** begins at time E **3018**, which does not depend on the completion of tasks C1 **3042** or C2 **3044**, although it could depend on the completion of task D1 **3050** in step D **3048**. Step C can be assigned to team C **3078**, which utilizes a mixture of assignments to a specified user as well as to roles (*i.e.*, any user having such a role, subject to other restrictions). Task C1 **3042** is assigned to a role-type C1 **3080**, task C2 **3044** is assigned to a role-type C2 **3082**, and task C3 **3046** is assigned to a specific user C3 **3084**.

Step D **3048** comprises tasks D1 **3050**, D2 **3052**, D3 **3054**, and D4 **3056**. Task D1 **3050** has a start time of time D **3016**, which may or may not coincide with the completion of steps A **3028** and B **3034**. Task D1 has a completion deadline of time E **3018**. Task D2 **3052** has a start time E **3018** (which could differ from the actual start time for task C3 **3046** if it begins immediately following the completion of task D1 **3050** whereas task D2 **3052** may begin at a specified time, and wherein time E **3018** could mean: a specified time, the latest of the completion times of one or more preceding tasks, or both, thus (in some embodiments) being relative to each task). Task D3 **3054** has a start time of time F **3020**, with a deadline of time G **3022**, wherein initiating task D3 **3054** may depend upon completion of task D2 **3052**, which may depend upon the completion of task D1 **3050**. Task D4 **3056** can have a start time of time D **3016** and a completion deadline of time G **3022**.

Step D **3048** can be assigned to team D **3086** which comprises roles D1 **3088**, D2 **3090**, and D3 **3092**. Tasks D1 **3050** and D3 **3054** are assigned to role-type D1 **3088**. Some embodiments can assign the same user within role-type D1 **3088** to both tasks D1 **3050** and D3 **3054**. Other embodiments can require that different users (if desirable and/or not impracticable, due to either a lack of such users within the role, or other users having too much of a workload at the moment) within role-type D1 **3088** be assigned to each of tasks D1 **3050** and D3 **3054**. Other embodiments may not specifically require the same or a different user within a role-type for different tasks/steps, regardless of whether they overlap in time or not. Task D2 **3052** is assigned to role-type D2 **3090** and task D4 **3056** is assigned to role-type D3 **3092**. Any role-type described herein can be a subset of any other role-type (such as role-type D3 **3092** being a subset of role-type D2 **3090**, wherein role-type D2 **3090** includes all users in role-type D3 **3092**, but not vice-versa).

Workstate 3 **3006** comprises step E **3058**, having a start time of time G **3022** and a completion deadline of time I **3026**. Step E **3058** comprises tasks E1 **3060**, E2 **3062**, and E3 **3064**. Task E1 **3060** has a start time of time of Time G **3022** and a deadline of Time H **3024**. Task E2 **3062** has a start time of Time G **3022** and a deadline of time I **3026**. Task E3 **3064** has a start time of Time H **3024** and a deadline of Time I **3026**. Task E1 **3060** may require completion prior to initiating task E3 **3064**.

Step E **3058** is assigned to team E **3094**, which comprises role-types E1 **3096** and E2 **3098**. Tasks E1 **3060** and E2 **3062** are assigned to role-type E1 **3096** and task E3 **3064** is assigned to role-type E2 **3098**. Completion of workstate 3 **3006** can result in the initiation of a subsequent workstate (not shown) or in the completion of the workflow **3000**.

Some embodiments can also utilize a graphical dashboard interface so that users and/or administrators can track workflows along with workstates, steps, and tasks within each workflow. For example, a user or administrator could set threshold time limits to change from green (up to 2 weeks before the deadline) to yellow (1-2 weeks before the deadline) to orange (1 week until the deadline) to red (deadline exceeded). Any change in status could trigger notification to the user, their supervisor(s), administrators, or other designated users/administrators in an organization or company (or other designated users/administrators outside the organization or company). Any type of reporting and/or metrics can be run based upon a user's performance (or the performance of multiple users, such as a designated group or team), such as average pendency across all (or a subset) of workflows/workstates/steps/tasks to which they have been assigned. Some embodiments can utilize reporting having a continuous query language (CQL) implementation, wherein a query is long-lasting (or permanent/persistent), wherein results are updated in real-time (or periodically) as new data becomes available and is fed through the query. For example, a continuous query can be established that updates in real-time (or periodically, such as weekly, for example) the *top-n* performing employees according to their aggregate timeliness, where *n* can be any positive integer. As updated data regarding each employee's timeliness is received, the persistent query can update the results anytime there is a change in the rankings, or based on a specified periodicity. Such CQL reporting can be implemented in any interface described herein, for any data described herein.

FIG. **125** is an example of a QA item status review interface for a workstate or workflow. Display tabs **3500** include options to preview a document, check status history, and manage QA items. Under the QA tab, for example, the current document title **3502** can be listed, along with the client name **3504**, workflow name **3506**, and the current equipment item **3508**. Some embodiments utilize a similar interface for QA items associated with equipment items (instead of, or along with, QA items for documents). Each QA item record **3510** can be selected with any appropriate indicator, displayed here as a check-box **3511**, along with an option to reset all available checkboxes **3518**. The number of QA items remaining **3514** can be displayed as well. Each QA item record **3510** can be displayed with a QA items list **3512** which can include textual and/or graphical descriptions of QA items and a completed by **3516** indicator that can indicate the user that completed the QA item along with a completion timestamp **170**. Current document status **3520** can include any appropriate status such as 'needs review' or 'reviewed,' for example. The current workstate **3522** within the current workflow **3506** can also be displayed. The current workstate owner **3524** can also be displayed. In some embodiments, a workstate owner can create/edit teams for step/task assignment within the workflow, and may also be able to specify deadlines, start times, dependencies, etc. Messaging options **3526** can include requesting a review and further specifying the request as urgent. An option can also be presented to search for a recipient name **3528** among a listing/directory of users, although any suitable entry/search interface can be utilized, including manual name entry and auto-complete/suggestions. User name search input can also be cleared **3530** at any time. When ready, the data in the QA item status review interface can be saved **3532**. Alternatively, the QA item status review interface can be closed **3533** without saving the data. Various help indicators **3534** can also be utilized to clarify any such options.

FIG. **126** continues with the present embodiment by depicting an example of a workstate change interface. By selecting the current workstate **3522** as shown in FIG. **125**, selectable workstates **3536** are presented, shown to be (for example) 'intake,' 'pending CRT evaluation,' 'pending demo follow up,' and 'coding/documentation.' Once selected (or manually inputted in some embodiments), the updated workstate can be saved **3532**.

FIG. **127** continues with the present example by depicting a change in workstate ownership. By selecting the current workstate owner, as shown by **3524** in FIGS. **125-126**, an option can be utilized to change the workstate owner, for example, by searching for another user to be assigned workstate ownership **3538**, while the current workstate owner **3524** can also be displayed. An input-clearing option **3530** can also be presented to clear any text in the workstate owner search field **3538**, along with a save option **3532**.

FIG. **128** shows another embodiment with respect to FIG. **125**, with QA item submission tabs **3501** that can include selection, assigning, and QA options. This embodiment displays submit actions **3540** that can include, for example, 'continue processing' and 'go to workflow' to govern what happens once a submit indicator **3542** is selected.

FIG. **129** shows another embodiment with respect to FIG. **126**, with submit actions **3540** that can include, for example, 'continue processing' and 'go to workflow' to govern what happens once a submit indicator **3542** is selected.

FIG. **130** shows another embodiment with respect to FIG. **127**, also having submit actions **3540** that can include, for example, 'continue processing' and 'go to workflow' to govern what happens once a submit indicator **3542** is selected.

FIG. **131** depicts an element view of a workflow. The workflow title (and/or number) **3600**, outside database/data source (here BRIGHTREE®) title/number **3602**, current workstate **3604**, workstate owner **3606**, workstate due date **3608**, and workstate status **3610** (such as 'overdue') can be displayed. Workflow actions **502** can include changing the workflow status or date needed, for example, as well as an option to delete the current workflow. A client display **312** can be utilized, which in some embodiments can bring up any client information interface described herein. Additionally, a notes selection option **316** can be utilized, which can bring up any notes interface described herein, such as the example depicted in FIG. **30**. Workflow view options **3612** can include an element view (depicted here in FIG. **131**), a workstate view (depicted in FIGS. **132-133**), and a workstate history view (depicted in FIG. **134**). Workflow interface options **500** can include, for example, accessing workflow data, here shown as tabs, comprising client info, current equipment, assessments, client photos, measurements, items, profit analysis, final review, and documents, for example. Here, data can be presented under the client info tab **500** relating to a client evaluation date **458**, the client's information **310**, and the client's diagnosis data **3614** (which can utilize or be similar to any diagnosis interface described herein). Further options, depicted here at the bottom, can include view/manage workflow notes **413** (which can utilize any notes interface described herein), view/send messages **414** (which can bring up a workflow messaging interface as depicted in FIG. **42**, or any other suitable interface), outside database/data source info **416** (which can be used for connection to BRIGHTREE®, for example), current workstate **3604**, and workstate owner **3606**.

FIG. **132** is an illustration depicting a workflow with expanded workstates utilizing a workstate view **3612**. For each workstate record **3624**, the workstate name and/or type **3616**, the workstate status **3618** (such as completed, not started, in progress, overdue, etc.), date complete **3620**, and due date counter **3622** can be displayed. For a selected workstate **3624**, information regarding, for example, the workstate owner **3606**, a completion goal **3626**, and a workstate description **3628** can be displayed. Additional information related to the records of each step and/or task **3640** within the workstate **3630** can be displayed. For each step/task record **3640**, information can be displayed regarding (for example) the step/task name **3632**, the step/task due date **3634**, a completion indicator **3636**, and a completed by indicator **3638**, which that indicates the identity of user that completed the step/task (if completed). If a step/task is not yet complete, options can be presented to view more detailed step/task information **3642** and to change the step/task owner **3644**.

FIG. **133** continues with the current illustration of a workflow with expanded workstates utilizing a workstate view **3612**. This shows one completed workstate step/task **3624** 'intake' and one selected/expanded workstate **3624** 'pending CRT evaluation' having three completed steps/tasks **3640** ('CMN received - needs PAR,' 'PT/OT assessment complete,' and 'waiting clinician documentation') and one incomplete step/task **3640** ('pending PT/OT assessment') with options to go to a more detailed view of this incomplete step/task **3642** and to change the step/task owner **3644**. In this embodiment, a single incomplete step/task **3640** ('pending PT/OT assessment') prevents the workstate **3624** ('pending CRT evaluation') from being complete (as indicated graphically **496**), which in turn can prevent the workflow **3600** from being complete, even if all other workstates **3624** have been completed.

FIG. **134** is an illustration depicting a workstate history view **3612** of a workflow. An option can be utilized to show all or hide all history **3646**. Each workstate's name **3648**, status **3650** (*e.g.*, completed, in progress, overdue, not started), date/time completed **3652**, and due date counter **3654** can be displayed, for example. Within each workstate **3648**, each step/task record **3662** can be displayed with its description

3658 and date/time completed **3660**. Additionally, workstate notes **3664** can be viewed utilizing any notes interface described herein.

FIG. **135** is an illustration depicting a document search interface. Document menu items **3700** can include (for example) links to home, inbox, workflows, documents, document requests, clients, My Database, and deleted items, as discussed above. In documents tab **3702**, search options can include document name **3704** (which can utilize any input criteria discussed herein, such as manual input, auto-complete/suggestions, selecting a document, etc.), document status **3706** (such as completed, overdue, in progress, not completed, etc.), and advanced search options **3708**, which will be discussed below. Additionally, the template upon which a document is based (if applicable) can be searchable **3710**, and can utilize any input criteria discussed herein (such as manual input, auto-complete/suggestions, selecting a template, etc.). A document can also be searched by its date of creation **3714**, which can include a range specifying a start date/time **3716** and an end date/time **3718**. Other embodiments can include options to search by last modified and/or to utilize any such search/query criteria to template searches. Once a document search request is indicated **3720**, any suitable information, such as document title **3722**, client **3724**, document status **3726**, and QA Enabled **3728** can be displayed for any document search results.

FIG. **136** is an illustration depicting another embodiment of a document search interface, here displaying document record search results. Here, two document records **3730** are displayed, each displaying the document title **3722**, client **3724**, document status **3726**, QA enabled **3728**, and document actions **3732** (which can include editing the document, assigning/modifying its assignments to various workstates/workflows, and deleting the document). Selecting any of these fields can bring up a corresponding interface to modify the document record's corresponding data, such as document title, client name, or status. Selecting QA can bring up any QA-type interface described herein, such as the QA item status review interface discussed above.

FIG. **137** is an illustration depicting a document search interface with advanced search options in another embodiment. Here, there are multiple options within the document tabs **3702**, such as search clients, add a new client, client name, workflows, documents (presently selected), client photos, and client notes, for example. This embodiment shows additional document search criteria, which can correspond (in some embodiments) to the advanced search options **3708** depicted above in FIGS. **135-136**. Such additional search criteria can include, for example, searching workflows **3734**, including date range having a start date **3736** and an end date **3738** of when the workflow is needed (such as a workflow deadline). Additionally, search criteria can include a clinician's name **3740** and a physician's name **3742**. Any combination of search criteria from any embodiments described can be utilized in combination.

FIG. **138** is an illustration depicting an embodiment of the document search interface with a combination of search fields described above with respect to embodiments described in FIGS. **136-137**.

FIG. **139** is an illustration depicting an alternate embodiment of a document search interface with document records **3730** displayed in the document search results.

FIG. **140** illustrates an exemplary computer system **5000**, through which embodiments of the disclosure can be implemented. The system **5000** described herein is but one example of a suitable computing environment and does not suggest any limitation on the scope of any embodiments presented. Nothing illustrated or described with respect to the system **5000** should be interpreted as being required or as creating any type of dependency with respect to any element or plurality of elements. In a basic embodiment, the system **5000** often includes at least one processor **5002** and memory (non-volatile memory **5008** and/or volatile memory **5010**). The system **5000** can include one or more displays and/or output devices **5004** such as monitors, speakers, headphones, projectors, wearable-displays, holographic displays, and/or printers, for example. The system **5000** may further include one or more input devices **5006** which can include, by way of example, any type of mouse, keyboard, disk/media drive, memory stick/thumb-drive, memory card, pen, touch-input device, biometric scanner, voice/auditory input device, camera, etc. The system **5000** typically includes non-volatile memory **5008** (ROM, flash memory, etc.), volatile memory **5010** (RAM, etc.), or a combination thereof. The system **5000** can include one or more network interfaces **5012** to facilitate communication between the system **5000** and one or more additional devices, which may include, for example, client and/or server devices. A network interface **5012** can facilitate communications over one or more networks **5014** that may include any suitable type of public or private network, which by non-limiting example can include the internet, wireless networks, personal area networks (PAN), local area networks (LAN), wide area networks (WAN), municipal area networks (MAN), telephone networks, cable networks, fiber-optic networks, cellular networks, and/or satellite networks. All aforementioned devices, systems, connections, and/or accessories do not warrant further discussion as they are readily understood within the art.

A computer-readable medium **5016** may comprise a plurality of computer readable mediums, each of which may be either a computer readable storage medium or a computer readable signal medium. A computer readable storage medium **5016** may reside, for example, within an input device **5006,** non-volatile memory **5008**, volatile memory **5010**, or any combination thereof. A computer readable storage medium can include tangible media that is able to store instructions associated with, or used by, a device or system. A computer readable storage medium includes, by way of non-limiting examples: RAM, ROM, cache, fiber optics, EPROM/Flash memory, CD/DVD/BD-ROM, hard disk drives, solid-state storage, optical or magnetic storage devices, diskettes, electrical connections having a wire, or any combination thereof. A computer readable storage medium may also include, for example, a system or device that is of a magnetic, optical, semiconductor, or electronic type.

A computer readable signal medium can include any type of computer readable medium that is not a computer readable storage medium and may include, for example, propagated signals taking any number of forms such as optical, electromagnetic, or a combination thereof. A computer readable signal medium may include propagated data signals containing computer readable code, for example, within a carrier wave.

FIG. **141** illustrates an exemplary computing network **6000** through which client systems **6002**, **6004**, and **6006** can be coupled to one or more network(s) **6014** with server systems **6008**, **6010**, and **6012**. Any respective quantities of client systems and server systems can be utilized. A client system, such as those depicted in **6002**, **6004**, and **6006**, can include, for example, a computer system as depicted in **5000**.

Alternatively, a client can utilize any other configuration disclosed herein or as would be well known to one of ordinary skill in the art. Similarly, any server system, such as those depicted in **6008**, **6010**, and **6012**, generally utilizes a computer system as depicted in **5000**. Alternatively, a server can utilize any other configuration disclosed herein or as would be well known to one of ordinary skill in the art. Further, a server can be any known type of appropriate server, such as an application server, database server, etc. The network(s) depicted in **6014** can be implemented with, by non-limiting example, the internet, wireless networks, personal area networks (PAN), local area networks (LAN), wide area networks (WAN), municipal area networks (MAN), telephone networks, cable networks, fiber-optic networks, cellular networks, and/or satellite networks.

As described, exemplary computer system **5000** and/or one or more components of network architecture **6000** may perform and/or constitute a means for performing, either alone or in combination with other elements, one or more steps of an exemplary embodiment described herein. Any memory component, for example non-volatile memory **5008**, volatile memory **5010**, and/or a computer-readable medium **5016**, as depicted in exemplary computer system **5000**, can be utilized for distributed/cloud storage and/or retrieval. Any client or server can utilize one or more network interfaces as described above with respect to **5012**, or any other suitable network interface. The network architecture **6000** need not be limited to the internet or any other particular type of network. Each client and/or server can utilize software, for example, a web browser, to remotely send and retrieve data with respect to any other connected device.

Any device disclosed herein need not be limited to the clients and servers depicted in network architecture **6000**. All or any portion of any exemplary embodiment may be encoded as computer code, stored in, and/or run by, one or more servers **6008**, **6010**, and **6012**, and distributed over network(s) **6014** to one or more clients **6002**, **6004**, and **6006**, for example. Network architecture **6000** may perform and/or be a means for performing, either alone or in combination with any other element(s), one or more of the steps disclosed herein.

This invention has been described with reference to several preferred embodiments. Many modifications and alterations will occur to others upon reading and understanding the preceding specification. It is intended that the invention be construed as including all such alterations and modifications in so far as they come within the scope of the appended claims or the equivalents of these claims.

1. A computer-implemented method for workflow management of document processing through a user interface on a display device, comprising:

utilizing one or more objects associated with a workflow, wherein at least one object is imported from an external database;

creating or editing templates in a template editor utilizing the display device;

storing, in a template, rendering-data received through a template builder interface;

mapping to a workflow a template set whose criterion is satisfied by one of the objects associated with the workflow; and

generating a workflow of documents that are each rendered from the stored rendering-data in a template within a template set mapped to the workflow.

2. The computer-implemented method in claim 1 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a task whose initiation requires the completion of another task;

a team is assigned to each workstate;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member; and

at least one team member is selected among a plurality of users having such role.

3. The computer-implemented method in claim 1 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a step whose initiation requires the completion of another step;

each step comprises a task whose initiation requires the completion of another task;

a team is assigned to each step;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member;

at least one team member is selected among a plurality of users having such role;

each task, step, and workstate has deadline;

each team member receives a notification when a threshold amount of time, prior to their task's deadline, is exceeded and a subsequent notification when the deadline elapses;

each step is completed when the last incomplete constituent task is completed;

each workstate is completed when the last incomplete constituent step is completed; and

the workflow is completed with the last incomplete workstate is completed.

4. The computer-implemented method in claim 1 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow, comprising:

insurance provider object trigger options for a specified insurance provider object or any insurance provider object associated with the workflow;

a diagnosis object trigger option; or

item object trigger options comprising an item object code trigger, an item object name trigger, and an item object manufacturer trigger.

5. The computer-implemented method in claim 1 further comprising managing the template sets to which a template is assigned.

6. The computer-implemented method in claim 1 further comprising rendering one or more documents, each being rendered based upon the same selected template and being attached to the same workflow.

7. The computer-implemented method in claim 1 further comprising rendering one or more documents, each being based upon the same selected template and attached to the same workflow, based on displayed options that comprise:

rendering a document with a list of all insurance provider objects associated with the workflow;

rendering a document for each insurance provider object selected from among those associated with the workflow, wherein each generated document contains information regarding its associated insurance provider object; and

rendering a document for each insurance provider object associated with the workflow, wherein each generated document contains information regarding its associated insurance provider object.

8. The computer-implemented method in claim 1 wherein the template editor further comprises:

assigning or removing a template with respect to a template set based on:

object options comprising objects not being applicable, any objects, and only selected objects; and

code object options to use a template for all code objects, to use only specified code objects, and an option to exclude code objects entirely; and

displaying options to upload a template and to initialize or edit each of a template's properties, comprising: template title, field default font size, page counter location, recipient instructions text field, a fax cover sheet flag, and a compliance document flag.

9. The computer-implemented method in claim 1 further comprising:

rendering documents containing item object codes for:

all item objects associated with the instant workflow;

all item objects whose codes are specified; or

all item objects except those whose codes are specified as being excluded; and

attaching, to the instant workflow, documents rendered based upon the same selected template associated with the instant workflow.

10. The computer-implemented method in claim 1 wherein the template builder interface further comprises:

displaying an editable template with a listing of selectable input field templates;

receiving input designating a location within the template for a selected input field template; and

rendering a document, based upon the edited template, having an input field located thereon according to the received position information.

11. The computer-implemented method in claim 1 wherein the template builder interface further comprises:

displaying a selected editable template with a listing of selectable input field templates;

receiving input dragging and sizing a selected field template onto a pixel-defined location within the editable template;

displaying editable field property options comprising a required-field flag, a flag to propagate the field template to subsequent pages upon rendering, a specified default value, a specified comparison value, an encryption option, and a specified number of fields over which to split the instant field over upon rendering;

displaying a preview version of the editable template, wherein each associated field template is displayed according to its respective specified pixel position and specified field properties; and

rendering a document, based on the template, having an input field located thereon according to the received input.

12. The computer-implemented method in claim 1 wherein the template editor further comprises:

displaying options to assign and remove a template with respect to a template set; and

displaying options to create and edit a template.

13. The computer-implemented method in claim 1 wherein the template editor further comprises displaying options to toggle template visibility, to indicate a template is a favorite, and to clone a template by requiring a different title.

14. The computer-implemented method in claim 1 wherein the template editor further comprises a customizable checklist designating which fields in a rendered document require completion prior to the rendered document being designated as complete.

15. The computer-implemented method in claim 1 wherein the user interface further comprises displaying options for downloading, secure-sending electronic transmission, and faxing a rendered document.

16. The computer-implemented method in claim 1 wherein the template builder interface displays a notification in a rendered document when an object value does not match any values in a list of comparison values in a field in the template.

17. The computer-implemented method in claim 1 wherein the template builder interface outputs an item object listing within a rendered document, with any item objects exceeding a quantity threshold for a page being rendered on a subsequent page of the rendered document.

18. The computer-implemented method in claim 1 wherein the template builder interface further comprises an editable field property flag that auto-copies a value entered into a field rendered across all supplemental pages in a rendered document.

19. The computer-implemented method in claim 1 wherein the user interface further comprises a user delegating each document template in a workflow to one or more different users, which removes the workflow from the user's interface until at least one delegated document template is returned or cancelled.

20. The computer-implemented method in claim 1 wherein the user interface further comprises a profit analyzer interface that displays a profit index calculated by dividing a received positive item allowance amount by a received positive item cost amount.

21. The computer-implemented method in claim 1 wherein the user interface displays an object imported from an outside database as a selectable pre-generated object.

22. The computer-implemented method in claim 1 wherein a template is manually associated with a workflow.

23. The computer-implemented method in claim 1 wherein a field is displayed in the rendered document only if a recipient account is of a role type matching a role type specified by the recipient options within the field's recipient options.

24. The computer-implemented method in claim 1 wherein a change in data associated with a field propagates the field's data by causing an automatic re-rendering of all documents in the same workflow utilizing the field.

25. The computer-implemented method in claim 1 further comprising a signature input field that includes options to type and draw a signature, an option indicating the signer is authorized to sign, and an option indicating the client cannot sign with a field receiving the signer's name and relationship to the client and a field receiving a reason the client cannot sign.

26. The computer-implemented method in claim 1 wherein the quantity of pages in a rendered document corresponds to the quantity of item objects rendered in the rendered document.

27. The computer-implemented method in claim 1 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set.

28. The computer-implemented method in claim 1 wherein rendered documents are dynamically replicated into the workflow based on each different value of an object type within a workflow, each rendered document reflecting its respective value of the object type.

29. The computer-implemented method in claim 1 wherein rendered documents are delegated within a user account to selected user accounts associated with the user account, each selected user account being assigned to complete at least one delegated rendered document.

30. The computer-implemented method in claim 1 wherein rendered documents are delegated within a user account to selected user accounts associated with the user account, each selected user account being assigned to complete at least one delegated rendered document, whereupon completion of an assigned rendered document, the user interface presents append and replace options for the completed document.

31. The computer-implemented method in claim 1 wherein the workflow utilizes a work-in-progress comprising tasks to be completed, documents to be completed, appointments to be completed, role assigned to each task, deadline to complete each task, and the next work-in-progress state.

32. The computer-implemented method in claim 1 wherein the user interface presents a graphical dashboard interface of all workflows associated with a user account.

33. The computer-implemented method in claim 1 wherein the user interface removes a task associated with a user's account when the user has delegated all portions of the task to other users or groups within an organization to which the user account belongs.

34. The computer-implemented method in claim 1 wherein the user interface provides an option that hides a client's last name in all documentation associated with an organization.

35. The computer-implemented method in claim 1 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set, wherein a document from

the attached template set, once rendered, displays fields pre-populated with data from an object associated with the object trigger condition.

36. The computer-implemented method in claim 1 wherein the user interface further presents administrative options, for user accounts and fax numbers, comprising add, edit, update, and delete, with respect to both a company's account and to each of the company's plurality of branch locations.

37. A computer-implemented method of rendering a document through a template builder interface on a display device, comprising:

displaying a listing of selectable input field templates in an editable template;

displaying a thumbnail version of each template page;

subsequently receiving input dragging and sizing a selected field template onto the editable template, with the field template location corresponding to editable location values within the editable template;

displaying editable field properties comprising a required-field flag, a flag to propagate both the field template and its received data to subsequent pages upon rendering, a default value, and a comparison value;

subsequently displaying a preview version of the editable template, wherein each associated field template is displayed according to its respective specified location values and its field property values; and

subsequently rendering a document on the display device, based on the template, with an input field located on the rendered document according to the specified location values.

38. The computer-implemented method in claim 37 wherein the template builder interface further comprises displaying options, for a currently selected field template, comprising:

dragging, resizing, copying, deleting, field character limit, mandatory default value, optional default value, an encryption option, measurement unit types comprising weight measurement units, time measurement units, and size units comprising length, width, and height measurement units;

specifying a field type that comprises a text field, a drop-down list that utilizes input in a delimited document, a numeric split value that specifies a number of fields over which to split the instant field between upon rendering; and

selecting a recipient role comprising clinician, vendor, physician, and client.

39. A system for workflow management of document processing through a user interface on a display device, said system comprising:

a memory; and

a processor coupled to said memory, said processor configured to:

utilize one or more objects associated with a workflow, wherein at least one object is imported from an external database;

create or edit templates in a template editor;

storing, in a template, rendering-data received through a template builder interface;

map to a workflow a template set whose criterion is satisfied by one of said objects associated with said workflow; and

generate a workflow of documents that are each rendered from said stored rendering-data in a template within a template set mapped to said workflow.

40. The system in claim 39 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a task whose initiation requires the completion of another task;

a team is assigned to each workstate;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member; and

at least one team member is selected among a plurality of users having such role.

41. The system in claim 39 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a step whose initiation requires the completion of another step;

each step comprises a task whose initiation requires the completion of another task;

a team is assigned to each step;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member;

at least one team member is selected among a plurality of users having such role;

each task, step, and workstate has deadline;

each team member receives a notification when a threshold amount of time, prior to their task's deadline, is exceeded and a subsequent notification when the deadline elapses;

each step is completed when the last incomplete constituent task is completed;

each workstate is completed when the last incomplete constituent step is completed; and

the workflow is completed with the last incomplete workstate is completed.

42. The system in claim 39 wherein said criterion further comprises an object trigger condition that attaches a template set to a workflow, comprising:

insurance provider object trigger options for a specified insurance provider object or any insurance provider object associated with said workflow;

a diagnosis object trigger option; or

item object trigger options comprising an item object code trigger, an item object name trigger, and an item object manufacturer trigger.

43. The system in claim 39 wherein said user interface further comprises managing said template sets to which a template is assigned.

44. The system in claim 39 wherein said user interface further comprises rendering one or more documents, each being rendered based upon said same selected template and being attached to said same workflow.

45. The system in claim 39 wherein said user interface further comprises rendering one or more documents, each being based upon said same selected template and attached to said same workflow, based on displayed options that comprise:

rendering a document with a list of all insurance provider objects associated with said workflow;

rendering a document for each insurance provider object selected from among those associated with said workflow, wherein each generated document contains information regarding its associated insurance provider object; and

rendering a document for each insurance provider object associated with said workflow, wherein each generated document contains information regarding its associated insurance provider object.

46. The system in claim 39 wherein said template editor further comprises:

assigning or removing a template with respect to a template set based on:

object options comprising objects not being applicable, any objects, and only selected objects; and

code object options to use a template for all code objects, to use only specified code objects, and an option to exclude code objects entirely; and

displaying options to upload a template and to initialize or edit each of a template's properties, comprising: template title, field default font size, page counter location, recipient instructions text field, a fax cover sheet flag, and a compliance document flag.

47. The system in claim 39 wherein said user interface further comprises:

rendering documents containing item object codes for:

all item objects associated with said instant workflow;

all item objects whose codes are specified; or

all item objects except those whose codes are specified as being excluded; and

attaching, to said instant workflow, documents rendered based upon said same selected template associated with said instant workflow.

48. The system in claim 39 wherein said template builder interface further comprises:

displaying an editable template with a listing of selectable input field templates;

receiving input designating a location within said template for a selected input field template; and rendering a document, based upon said edited template, having an input field located thereon according to said received location information.

49. The system in claim 39 wherein said template builder interface further comprises:

displaying a selected editable template with a listing of selectable input field templates;

receiving input dragging and sizing a selected field template onto a pixel-defined location within said editable template;

displaying editable field property options comprising a required-field flag, a flag to propagate said field template to subsequent pages upon rendering, a specified default value, a specified comparison value, an encryption option, and a specified number of fields over which to split said field over upon rendering;

displaying a preview version of said editable template, wherein each associated field template is displayed according to its respective specified pixel position and specified field properties; and

rendering a document, based on said template, having an input field located thereon according to said received input.

50. The system in claim 39 wherein said template editor further comprises:

displaying options to assign and remove a template with respect to a template set; and

displaying options to create and edit a template.

51. The system in claim 39 wherein said template editor further comprises displaying options to toggle template visibility, to indicate a template is a favorite, and to clone a template by requiring a different title.

52. The system in claim 39 wherein said template editor further comprises a customizable checklist designating which fields in a rendered document require completion prior to said rendered document being designated as complete.

53. The system in claim 39 wherein said user interface further comprises displaying options for downloading, secure-sending electronic transmission, and faxing a rendered document.

54. The system in claim 39 wherein said template builder interface displays a notification in a rendered document when an object value does not match any values in a list of comparison values in a field in said template.

55. The system in claim 39 wherein said template builder interface outputs an item object listing within a rendered document, with any item objects exceeding a quantity threshold for a page being rendered on a subsequent page of said rendered document.

56. The system in claim 39 wherein said template builder interface further comprises an editable field property flag that auto-copies a value entered into a field rendered across all supplemental pages in a rendered document.

57. The system in claim 39 wherein said user interface further comprises a user delegating each document template in a workflow to one or more different users, which removes said workflow from said user's interface until at least one delegated document template is returned or cancelled.

58. The system in claim 39 wherein said user interface further comprises a profit analyzer interface that displays a profit index calculated by dividing a received positive item allowance amount by a received positive item cost amount.

59. The system in claim 39 wherein said user interface displays an object imported from an outside database as a selectable pre-generated object.

60. The system in claim 39 wherein a template is manually associated with a workflow.

61. The system in claim 39 wherein said user interface further comprises displaying a field in said rendered document only if a recipient account is of a role type matching a role type specified by recipient options within said field's recipient options.

62. The system in claim 39 wherein a change in data associated with a field propagates said field's data by causing an automatic re-rendering of all documents in the same workflow utilizing said field.

63. The system in claim 39 wherein said user interface further comprises a signature input field that includes options to type and draw a signature, an option indicating the signer is authorized to sign, and an option indicating the client cannot sign with a field receiving the signer's name and relationship to the client and a field receiving a reason the client cannot sign.

64. The system in claim 39 wherein the quantity of pages in a rendered document corresponds to the quantity of item objects rendered in said rendered document.

65. The system in claim 39 wherein said criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from said template set.

66. The system in claim 39 wherein rendered documents are dynamically replicated into said workflow based on each different value of an object type within a workflow, each rendered document reflecting its respective value of said object type.

67. The system in claim 39 wherein rendered documents are delegated within a user account to selected user accounts associated with said user account, each selected user account being assigned to complete at least one delegated rendered document.

68. The system in claim 39 wherein rendered documents are delegated within a user account to selected user accounts associated with said user account, each selected user account being assigned to complete at least one delegated rendered document, whereupon completion of an assigned rendered document, said user interface presents append and replace options for said completed document.

69. The system in claim 39 wherein said workflow utilizes a work-in-progress comprising tasks to be completed, documents to be completed, appointments to be completed, role assigned to each task, deadline to complete each task, and the next work-in-progress state.

70. The system in claim 39 wherein said user interface presents a graphical dashboard interface of all workflows associated with a user account.

71. The system in claim 39 wherein said user interface removes a task associated with a user's account when said user has delegated all portions of said task to other users or groups within an organization to which said user account belongs.

72. The system in claim 39 wherein said user interface provides an option that hides a client's last name in all documentation associated with an organization.

73. The system in claim 39 wherein said criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from said template set, wherein a document from said attached template set, once rendered, displays fields pre-populated with data from an object associated with said object trigger condition.

74. The system in claim 39 wherein said user interface further presents administrative options, for user accounts and fax numbers, comprising add, edit, update, and delete, with respect to both a company's account and to each of said company's plurality of branch locations.

75. A system for workflow management of rendering a document through a template builder interface

on a display device, said system comprising:

a memory; and

a processor coupled to said memory, said processor configured to:

display a listing of selectable input field templates in an editable template;

display a thumbnail version of each template page;

subsequently receive input dragging and sizing a selected field template onto said editable template, with said field template location corresponding to editable location values within said editable template;

display editable field properties comprising a required-field flag, a flag to propagate both said field template and its received data to subsequent pages upon rendering, a default value, and a comparison value;

subsequently display a preview version of said editable template, wherein each associated field template is displayed according to its respective specified location values and its field property values; and

subsequently render a document, based on said editable template, with an input field located on said rendered document according to said specified location values.

76. The system in claim 75 wherein said template builder interface further comprises displaying options, for a currently selected field template, comprising:

dragging, resizing, copying, deleting, field character limit, mandatory default value, optional default value, an encryption option, measurement unit types comprising weight measurement units, time measurement units, and size units comprising length, width, and height measurement units;

specifying a field type that comprises a text field, a drop-down list that utilizes input in a delimited document, a numeric split value that specifies a number of fields over which to split said field between upon rendering; and

selecting a recipient role comprising clinician, vendor, physician, and client.

77. A non-transitory computer-readable medium for workflow management of document processing through a user interface containing instructions that, when executed by a processor, cause the processor to perform a method comprising:

utilizing one or more objects associated with a workflow, wherein at least one object is imported from an external database;

creating or editing templates in a template editor utilizing the display device;

storing, in a template, rendering-data received through a template builder interface;

mapping to a workflow a template set whose criterion is satisfied by one of the objects associated with the workflow; and

generating a workflow of documents that are each rendered from the stored rendering-data in a template within a template set mapped to the workflow.

78. The non-transitory computer-readable medium in claim 77 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a task whose initiation requires the completion of another task;

a team is assigned to each workstate;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member; and

at least one team member is selected among a plurality of users having such role.

79. The non-transitory computer-readable medium in claim 77 wherein:

the workflow comprises a workstate whose initiation requires the completion of another workstate;

each workstate comprises a step whose initiation requires the completion of another step;

each step comprises a task whose initiation requires the completion of another task;

a team is assigned to each step;

each team comprises a plurality of roles, with each task corresponding to a role that corresponds to a team member;

at least one team member is selected among a plurality of users having such role;

each task, step, and workstate has deadline;

each team member receives a notification when a threshold amount of time, prior to their task's deadline, is exceeded and a subsequent notification when the deadline elapses;

each step is completed when the last incomplete constituent task is completed;

each workstate is completed when the last incomplete constituent step is completed; and

the workflow is completed with the last incomplete workstate is completed.

80. The non-transitory computer-readable medium in claim 77 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow, comprising:

insurance provider object trigger options for a specified insurance provider object or any insurance provider object associated with the workflow;

a diagnosis object trigger option; or

item object trigger options comprising an item object code trigger, an item object name trigger, and an item object manufacturer trigger.

81. The non-transitory computer-readable medium in claim 77 further comprising managing the template sets to which a template is assigned.

82. The non-transitory computer-readable medium in claim 77 further comprising rendering one or more documents, each being rendered based upon the same selected template and being attached to the same workflow.

83. The non-transitory computer-readable medium in claim 77 further comprising rendering one or more documents, each being based upon the same selected template and attached to the same workflow, based on displayed options that comprise:

rendering a document with a list of all insurance provider objects associated with the workflow;

rendering a document for each insurance provider object selected from among those associated with the workflow, wherein each generated document contains information regarding its associated insurance provider object; and

rendering a document for each insurance provider object associated with the workflow, wherein each generated document contains information regarding its associated insurance provider object.

84. The non-transitory computer-readable medium in claim 77 wherein the template editor further comprises:

assigning or removing a template with respect to a template set based on:

object options comprising objects not being applicable, any objects, and only selected objects; and

code object options to use a template for all code objects, to use only specified code objects, and an option to exclude code objects entirely; and

displaying options to upload a template and to initialize or edit each of a template's properties, comprising: template title, field default font size, page counter location, recipient instructions text field, a fax cover sheet flag, and a compliance document flag.

85. The non-transitory computer-readable medium in claim 77 further comprising:

rendering documents containing item object codes for:

all item objects associated with the instant workflow;

all item objects whose codes are specified; or

all item objects except those whose codes are specified as being excluded; and

attaching, to the instant workflow, documents rendered based upon the same selected template associated with the instant workflow.

86. The non-transitory computer-readable medium in claim 77 wherein the template builder interface further comprises:

displaying an editable template with a listing of selectable input field templates;

receiving input designating a location within the template for a selected input field template; and

rendering a document, based upon the edited template, having an input field located thereon according to the received position information.

87. The non-transitory computer-readable medium in claim 77 wherein the template builder interface further comprises:

displaying a selected editable template with a listing of selectable input field templates;

receiving input dragging and sizing a selected field template onto a pixel-defined location within the editable template;

displaying editable field property options comprising a required-field flag, a flag to propagate the field template to subsequent pages upon rendering, a specified default value, a specified comparison value, an encryption option, and a specified number of fields over which to split the instant field over upon rendering;

displaying a preview version of the editable template, wherein each associated field template is displayed according to its respective specified pixel position and specified field properties; and

rendering a document, based on the template, having an input field located thereon according to the received input.

88. The non-transitory computer-readable medium in claim 77 wherein the template editor further comprises:

displaying options to assign and remove a template with respect to a template set; and

displaying options to create and edit a template.

89. The non-transitory computer-readable medium in claim 77 wherein the template editor further comprises displaying options to toggle template visibility, to indicate a template is a favorite, and to clone a template by requiring a different title.

90. The non-transitory computer-readable medium in claim 77 wherein the template editor further comprises a customizable checklist designating which fields in a rendered document require completion prior to the rendered document being designated as complete.

91. The non-transitory computer-readable medium in claim 77 wherein the user interface further comprises displaying options for downloading, secure-sending electronic transmission, and faxing a rendered document.

92. The non-transitory computer-readable medium in claim 77 wherein the template builder interface displays a notification in a rendered document when an object value does not match any values in a list of comparison values in a field in the template.

93. The non-transitory computer-readable medium in claim 77 wherein the template builder interface outputs an item object listing within a rendered document, with any item objects exceeding a quantity threshold for a page being rendered on a subsequent page of the rendered document.

94. The non-transitory computer-readable medium in claim 77 wherein the template builder interface further comprises an editable field property flag that auto-copies a value entered into a field rendered across all supplemental pages in a rendered document.

95. The non-transitory computer-readable medium in claim 77 wherein the user interface further comprises a user delegating each document template in a workflow to one or more different users, which removes the workflow from the user's interface until at least one delegated document template is returned or cancelled.

96. The non-transitory computer-readable medium in claim 77 wherein the user interface further comprises a profit analyzer interface that displays a profit index calculated by dividing a received positive item allowance amount by a received positive item cost amount.

97. The non-transitory computer-readable medium in claim 77 wherein the user interface displays an object imported from an outside database as a selectable pre-generated object.

98. The non-transitory computer-readable medium in claim 77 wherein a template is manually associated with a workflow.

99. The non-transitory computer-readable medium in claim 77 wherein a field is displayed in the rendered document only if a recipient account is of a role type matching a role type specified by the recipient options within the field's recipient options.

100. The non-transitory computer-readable medium in claim 77 wherein a change in data associated with a field propagates the field's data by causing an automatic re-rendering of all documents in the same workflow utilizing the field.

101. The non-transitory computer-readable medium in claim 77 further comprising a signature input field that includes options to type and draw a signature, an option indicating the signer is authorized to sign, and an option indicating the client cannot sign with a field receiving the signer's name and relationship to the client and a field receiving a reason the client cannot sign.

102. The non-transitory computer-readable medium in claim 77 wherein the quantity of pages in a rendered document corresponds to the quantity of item objects rendered in the rendered document.

103. The non-transitory computer-readable medium in claim 77 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set.

104. The non-transitory computer-readable medium in claim 77 wherein rendered documents are dynamically replicated into the workflow based on each different value of an object type within a workflow, each rendered document reflecting its respective value of the object type.

105. The non-transitory computer-readable medium in claim 77 wherein rendered documents are delegated within a user account to selected user accounts associated with the user account, each selected user account being assigned to complete at least one delegated rendered document.

106. The non-transitory computer-readable medium in claim 77 wherein rendered documents are delegated within a user account to selected user accounts associated with the user account, each selected user account being assigned to complete at least one delegated rendered document, whereupon completion of an assigned rendered document, the user interface presents append and replace options for the completed document.

107. The non-transitory computer-readable medium in claim 77 wherein the workflow utilizes a work-in-progress comprising tasks to be completed, documents to be completed, appointments to be completed, role assigned to each task, deadline to complete each task, and the next work-in-progress state.

108. The non-transitory computer-readable medium in claim 77 wherein the user interface presents a graphical dashboard interface of all workflows associated with a user account.

109. The non-transitory computer-readable medium in claim 77 wherein the user interface removes a task associated with a user's account when the user has delegated all portions of the task to other users or groups within an organization to which the user account belongs.

110. The non-transitory computer-readable medium in claim 77 wherein the user interface provides an option that hides a client's last name in all documentation associated with an organization.

111. The non-transitory computer-readable medium in claim 77 wherein the criterion further comprises an object trigger condition that attaches a template set to a workflow based on satisfying a data range condition for an input value received in a field in a rendered document from the template set, wherein a document from the attached template set, once rendered, displays fields pre-populated with data from an object associated with the object trigger condition.

112. The non-transitory computer-readable medium in claim 77 wherein the user interface further presents administrative options, for user accounts and fax numbers, comprising add, edit, update, and delete, with respect to both a company's account and to each of the company's plurality of branch locations.

113. A non-transitory computer-readable medium for rendering a document through a template builder interface containing instructions that, when executed by a processor, cause the processor to perform a method comprising:

displaying a listing of selectable input field templates in an editable template;

displaying a thumbnail version of each template page;

subsequently receiving input dragging and sizing a selected field template onto the editable template, with the field template location corresponding to editable location values within the editable template;

displaying editable field properties comprising a required-field flag, a flag to propagate both the field template and its received data to subsequent pages upon rendering, a default value, and a comparison value;

subsequently displaying a preview version of the editable template, wherein each associated field template is displayed according to its respective specified location values and its field property values; and

subsequently rendering a document on the display device, based on the template, with an input field located on the rendered document according to the specified location values.

114. The non-transitory computer-readable medium in claim 113 wherein the template builder interface further comprises displaying options, for a currently selected field template, comprising:

dragging, resizing, copying, deleting, field character limit, mandatory default value, optional default value, an encryption option, measurement unit types comprising weight measurement units, time measurement units, and size units comprising length, width, and height measurement units;

specifying a field type that comprises a text field, a drop-down list that utilizes input in a delimited document, a numeric split value that specifies a number of fields over which to split the instant field between upon rendering; and

selecting a recipient role comprising clinician, vendor, physician, and client.

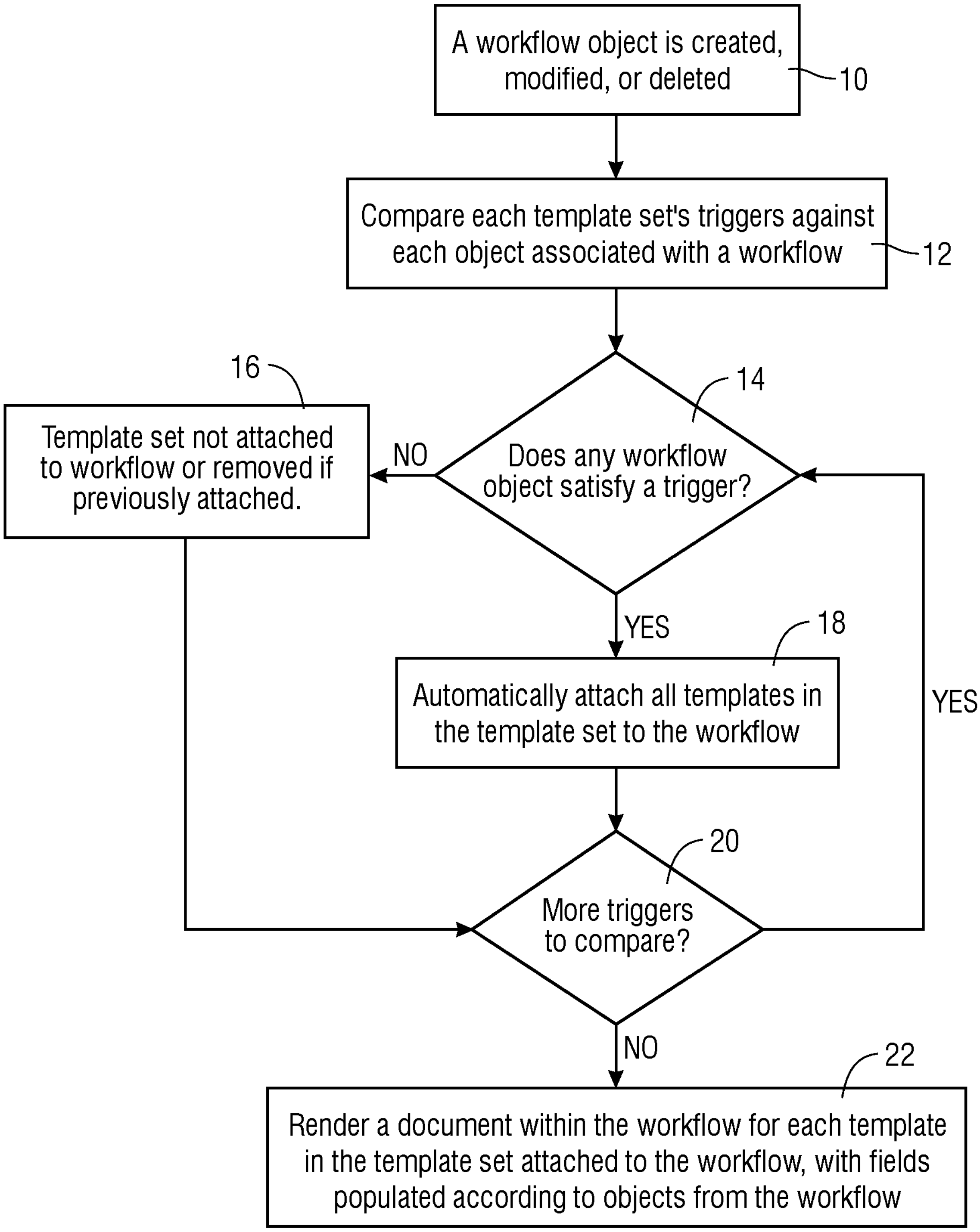

A workflow object is created, modified, or deleted
10
Compare each template set's triggers against each object associated with a workflow
12
16
Template set not attached to workflow or removed if previously attached.
NO
14
Does any workflow object satisfy a trigger?
YES
18
Automatically attach all templates in the template set to the workflow
YES
20
More triggers to compare?
NO
22
Render a document within the workflow for each template in the template set attached to the workflow, with fields populated according to objects from the workflow

Fig.1

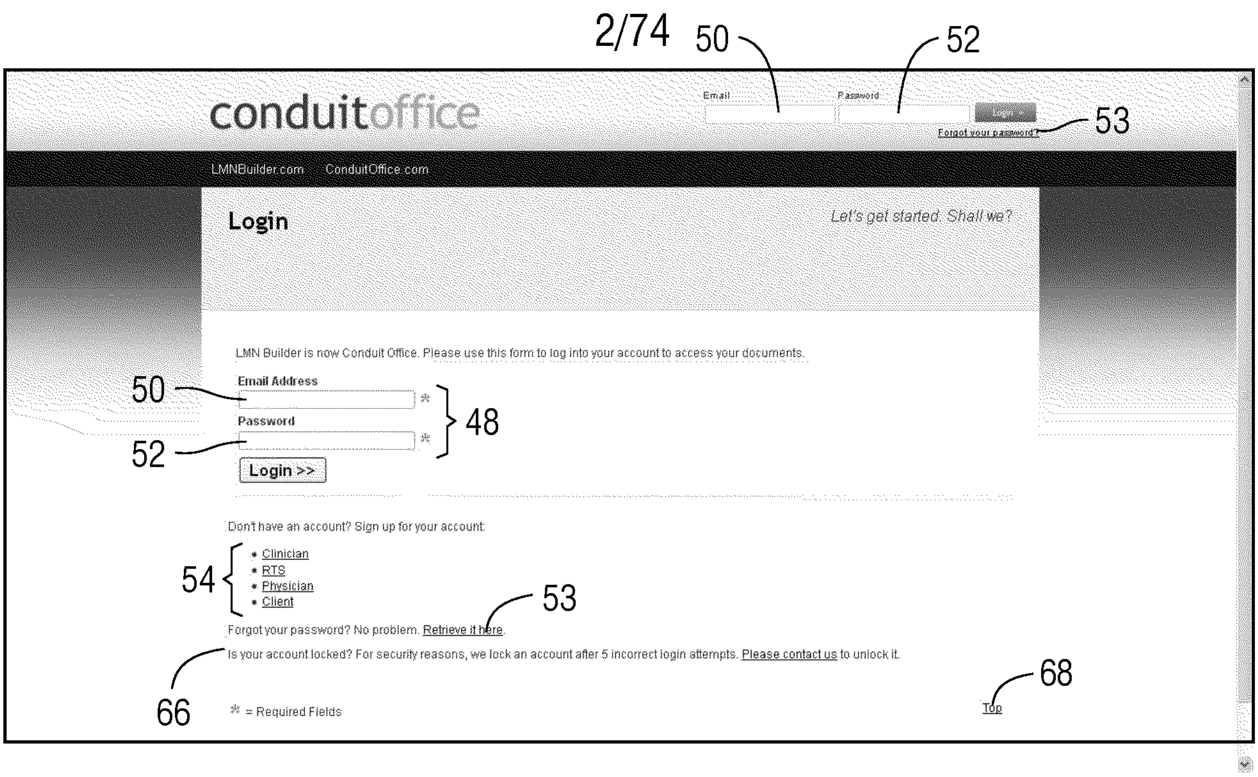

50
52
53
conduitoffice
Email
Password
Forgot your password?
LMNBuilder.com
ConduitOffice.com
Login
Let's get started. Shall we?
LMN Builder is now Conduit Office. Please use this form to log into your account to access your documents.
Email Address
Password
48
Login >>
Don't have an account? Sign up for your account:
54
Clinician
RTS
Physician
Client
Forgot your password? No problem. Retrieve it here.
Is your account locked? For security reasons, we lock an account after 5 incorrect login attempts. Please contact us to unlock it.
66
68
* = Required Fields
Top

Fig.2

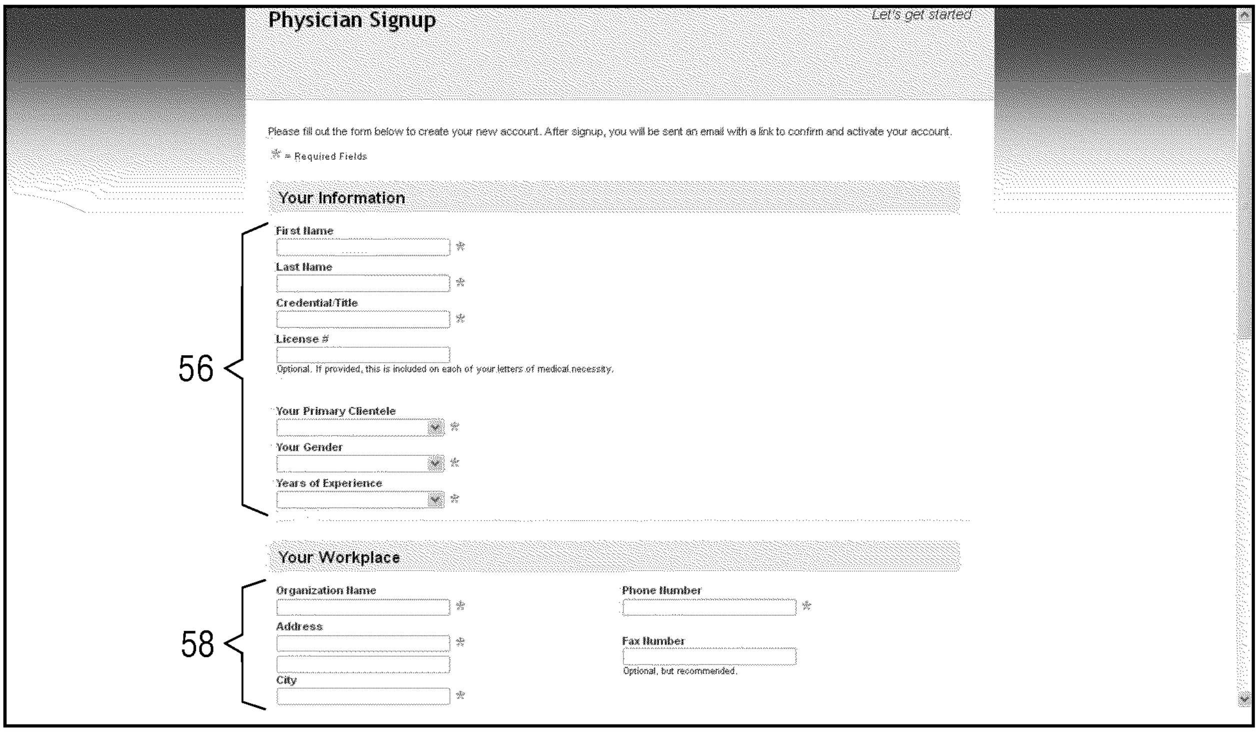

Physician Signup
Let's get started
Please fill out the form below to create your new account. After signup, you will be sent an email with a link to confirm and activate your account.
* = Required Fields
Your Information
56
First Name
Last Name
Credential/Title
License #
Optional. If provided, this is included on each of your letters of medical necessity.
Your Primary Clientele
Your Gender
Years of Experience
Your Workplace
58
Organization Name
Address
City
Phone Number
Fax Number
Optional, but recommended.

Fig.3

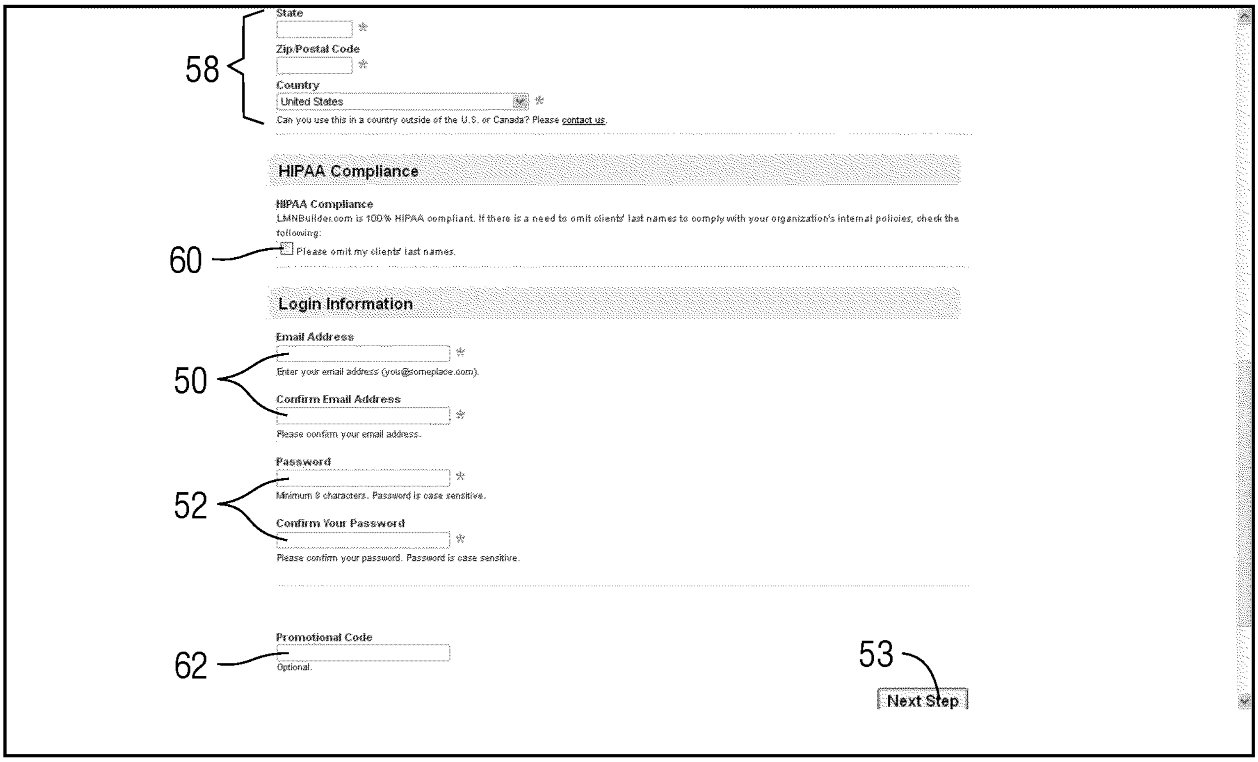
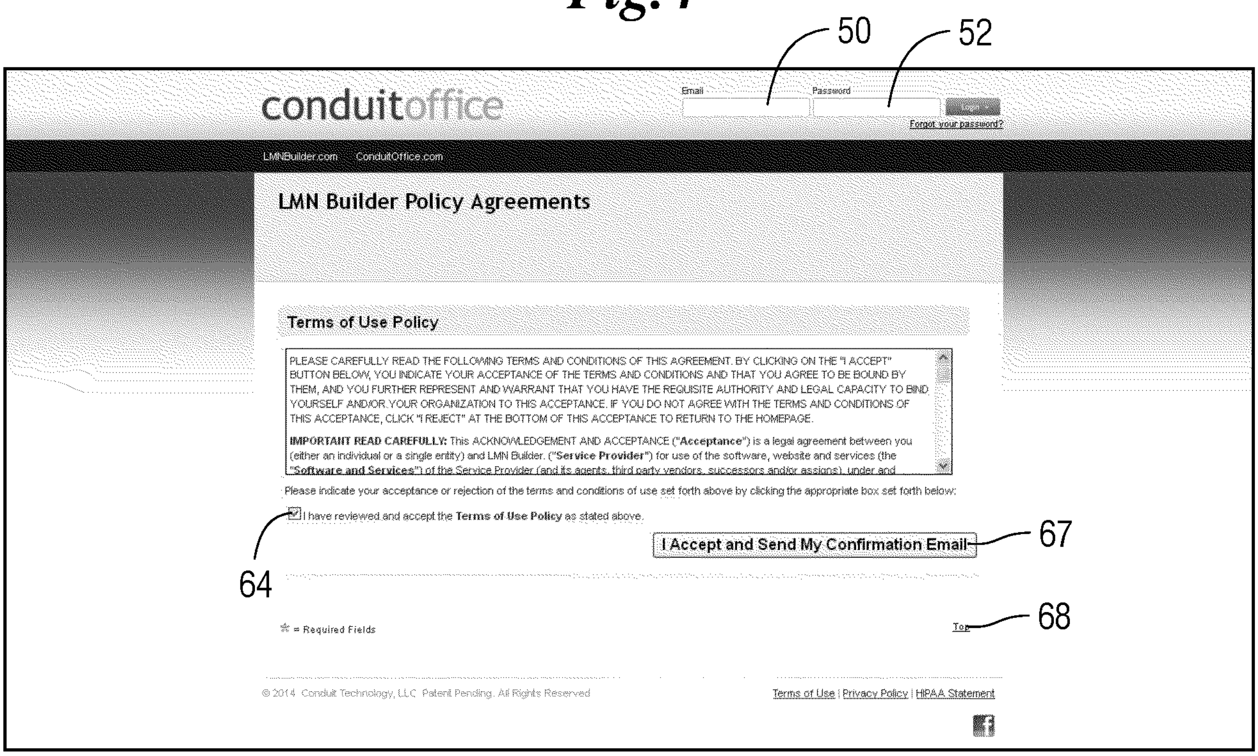

State
Zip/Postal Code
Country
United States
Can you use this in a country outside of the U.S. or Canada? Please contact us.
HIPAA Compliance
HIPAA Compliance
LMNBuilder.com is 100% HIPAA compliant. If there is a need to omit clients' last names to comply with your organization's internal policies, check the following:
Please omit my clients' last names.
Login Information
Email Address
Enter your email address (you@someplace.com).
Confirm Email Address
Please confirm your email address.
Password
Minimum 8 characters. Password is case sensitive.
Confirm Your Password
Please confirm your password. Password is case sensitive.
Promotional Code
Optional.
Next Step
58
60
50
52
62
53

Fig.4


conduitoffice
Email
Password
Forgot your password?
LMNBuilder.com
ConduitOffice.com
LMN Builder Policy Agreements
Terms of Use Policy
PLEASE CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS OF THIS AGREEMENT. BY CLICKING ON THE "I ACCEPT" BUTTON BELOW, YOU INDICATE YOUR ACCEPTANCE OF THE TERMS AND CONDITIONS AND THAT YOU AGREE TO BE BOUND BY THEM, AND YOU FURTHER REPRESENT AND WARRANT THAT YOU HAVE THE REQUISITE AUTHORITY AND LEGAL CAPACITY TO BIND YOURSELF AND/OR YOUR ORGANIZATION TO THIS ACCEPTANCE. IF YOU DO NOT AGREE WITH THE TERMS AND CONDITIONS OF THIS ACCEPTANCE, CLICK "I REJECT" AT THE BOTTOM OF THIS ACCEPTANCE TO RETURN TO THE HOMEPAGE.
IMPORTANT READ CAREFULLY: This ACKNOWLEDGEMENT AND ACCEPTANCE ("Acceptance") is a legal agreement between you (either an individual or a single entity) and LMN Builder. ("Service Provider") for use of the software, website and services (the "Software and Services") of the Service Provider (and its agents, third party vendors, successors and/or assigns), under and
Please indicate your acceptance or rejection of the terms and conditions of use set forth above by clicking the appropriate box set forth below:
I have reviewed and accept the Terms of Use Policy as stated above.
I Accept and Send My Confirmation Email
= Required Fields
Top
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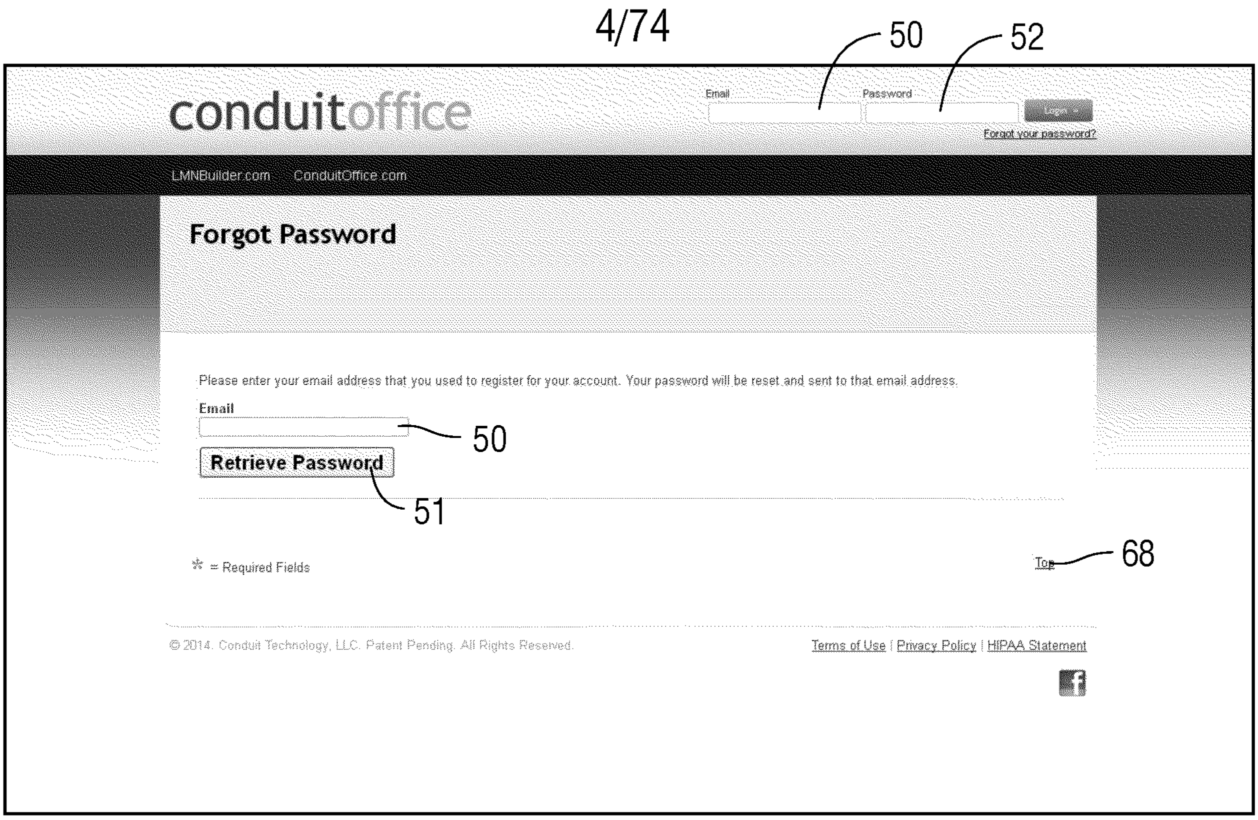
50
52
67
64
68

Fig.5



50
52
conduitoffice
Email
Password
Forgot your password?
LMNBuilder.com
ConduitOffice.com
Forgot Password
Please enter your email address that you used to register for your account. Your password will be reset and sent to that email address.
Email
50
Retrieve Password
51
* = Required Fields
Top
68
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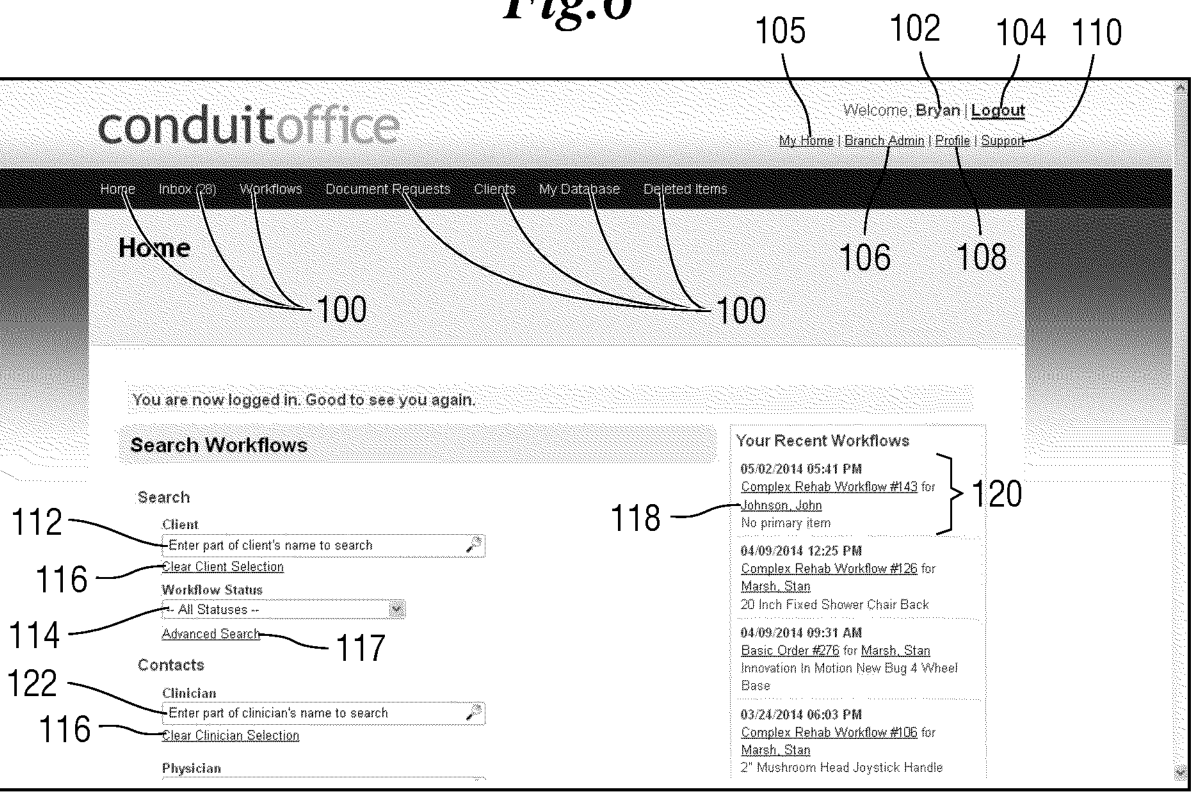
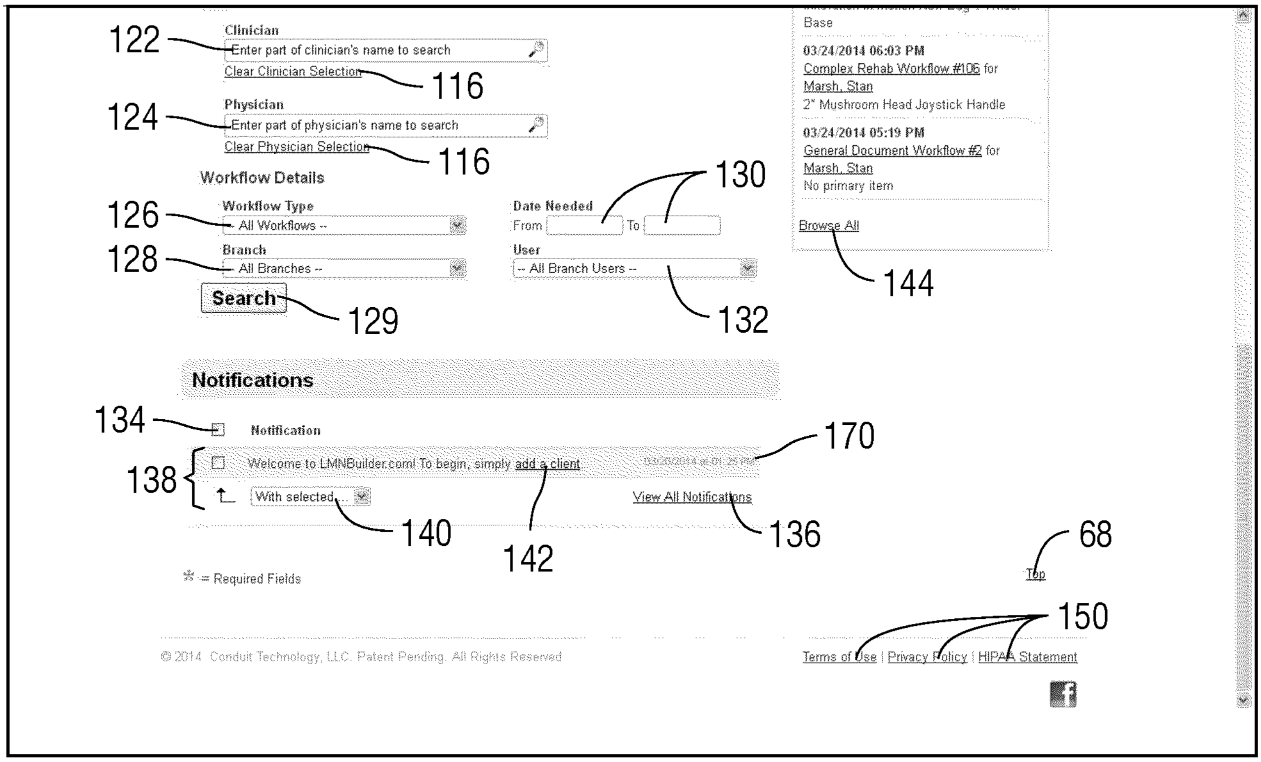
Fig.6



105
102
104
110
conduitoffice
Welcome, Bryan | Logout
My Home | Branch Admin | Profile | Support
Home
Inbox (28)
Workflows
Document Requests
Clients
My Database
Deleted Items
Home
100
100
106
108
You are now logged in. Good to see you again.
Search Workflows
Search
Client
Enter part of client's name to search
Clear Client Selection
Workflow Status
-- All Statuses --
Advanced Search
Contacts
Clinician
Enter part of clinician's name to search
Clear Clinician Selection
Physician
112
116
114
117
122
116
Your Recent Workflows
05/02/2014 05:41 PM
Complex Rehab Workflow #143 for
Johnson, John
No primary item
04/09/2014 12:25 PM
Complex Rehab Workflow #126 for
Marsh, Stan
20 Inch Fixed Shower Chair Back
04/09/2014 09:31 AM
Basic Order #276 for Marsh, Stan
Innovation In Motion New Bug 4 Wheel
Base
03/24/2014 06:03 PM
Complex Rehab Workflow #106 for
Marsh, Stan
2" Mushroom Head Joystick Handle
118
120

Fig.7



Clinician
Enter part of clinician's name to search
Clear Clinician Selection
Physician
Enter part of physician's name to search
Clear Physician Selection
Workflow Details
Workflow Type
-- All Workflows --
Date Needed
From
To
Branch
-- All Branches --
User
-- All Branch Users --
Search
Notifications
Notification
Welcome to LMNBuilder.com! To begin, simply add a client
With selected...
View All Notifications
* = Required Fields
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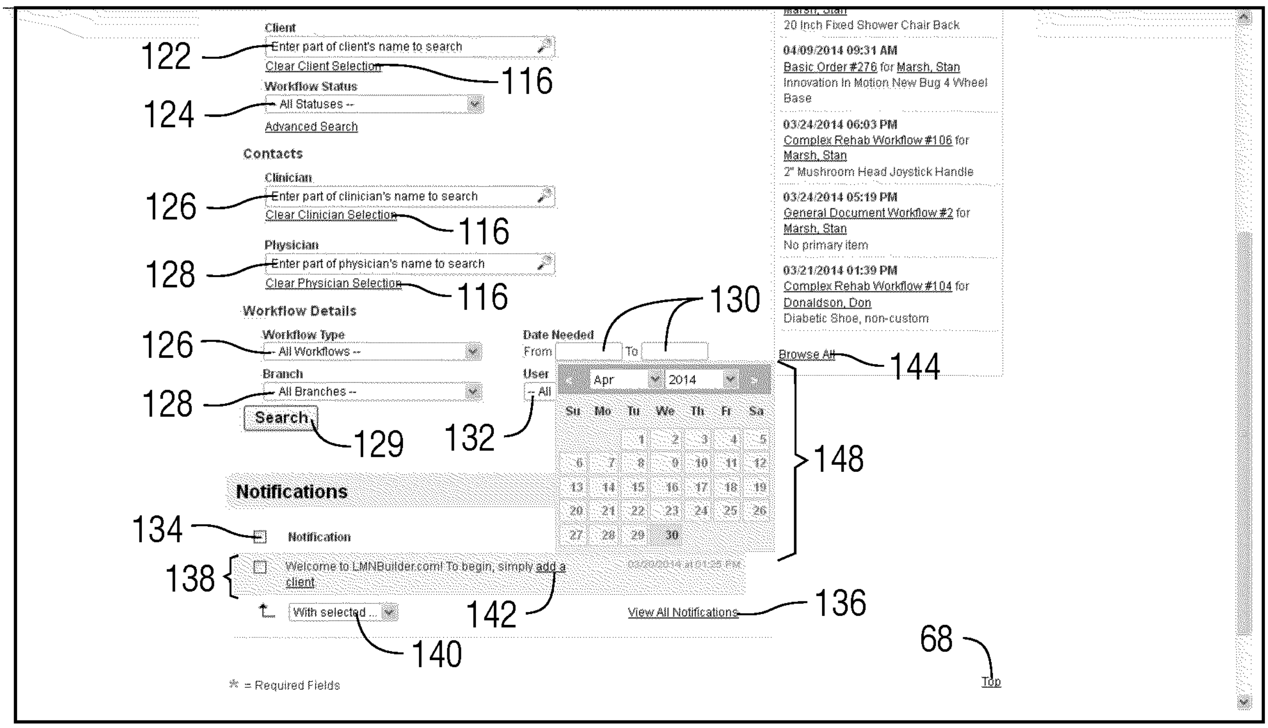
Top
Base
03/24/2014 06:03 PM
Complex Rehab Workflow #106 for Marsh, Stan
2" Mushroom Head Joystick Handle
03/24/2014 05:19 PM
General Document Workflow #2 for Marsh, Stan
No primary item
Browse All
122
124
116
116
126
128
129
130
132
144
134
138
170
140
142
136
68
150

Fig.8



Client
Enter part of client's name to search
Clear Client Selection
Workflow Status
-- All Statuses --
Advanced Search
Contacts
Clinician
Enter part of clinician's name to search
Clear Clinician Selection
Physician
Enter part of physician's name to search
Clear Physician Selection
Workflow Details
Workflow Type
-- All Workflows --
Date Needed
From
To
Branch
-- All Branches --
User
-- All
Search
Apr
2014
Su Mo Tu We Th Fr Sa
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
Notifications
Notification
Welcome to LMNBuilder.com! To begin, simply add a client
With selected ...
View All Notifications
* = Required Fields
Top
20 Inch Fixed Shower Chair Back
04/09/2014 09:31 AM
Basic Order #276 for Marsh, Stan
Innovation In Motion New Bug 4 Wheel Base
03/24/2014 06:03 PM
Complex Rehab Workflow #106 for Marsh, Stan
2" Mushroom Head Joystick Handle
03/24/2014 05:19 PM
General Document Workflow #2 for Marsh, Stan
No primary item
03/21/2014 01:39 PM
Complex Rehab Workflow #104 for Donaldson, Don
Diabetic Shoe, non-custom
Browse All
122
116
124
126
116
128
116
130
126
144
128
132
129
148
134
138
142
136
140
68

Fig.9

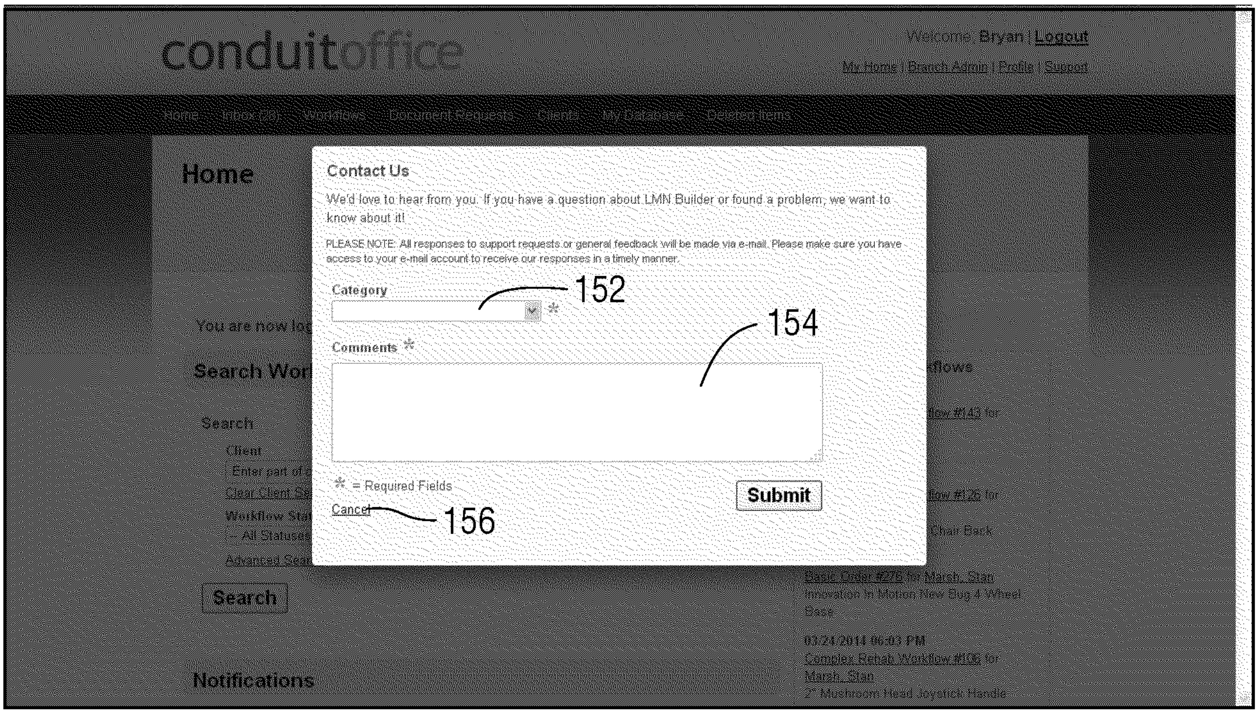

conduitoffice
Welcome, Bryan | Logout
My Home | Branch Admin | Profile | Support
Home
Contact Us
We'd love to hear from you. If you have a question about LMN Builder or found a problem, we want to know about it!
PLEASE NOTE: All responses to support requests or general feedback will be made via e-mail. Please make sure you have access to your e-mail account to receive our responses in a timely manner.
Category
Comments
= Required Fields
Cancel
Submit
152
154
156
Search
Notifications

Fig.10

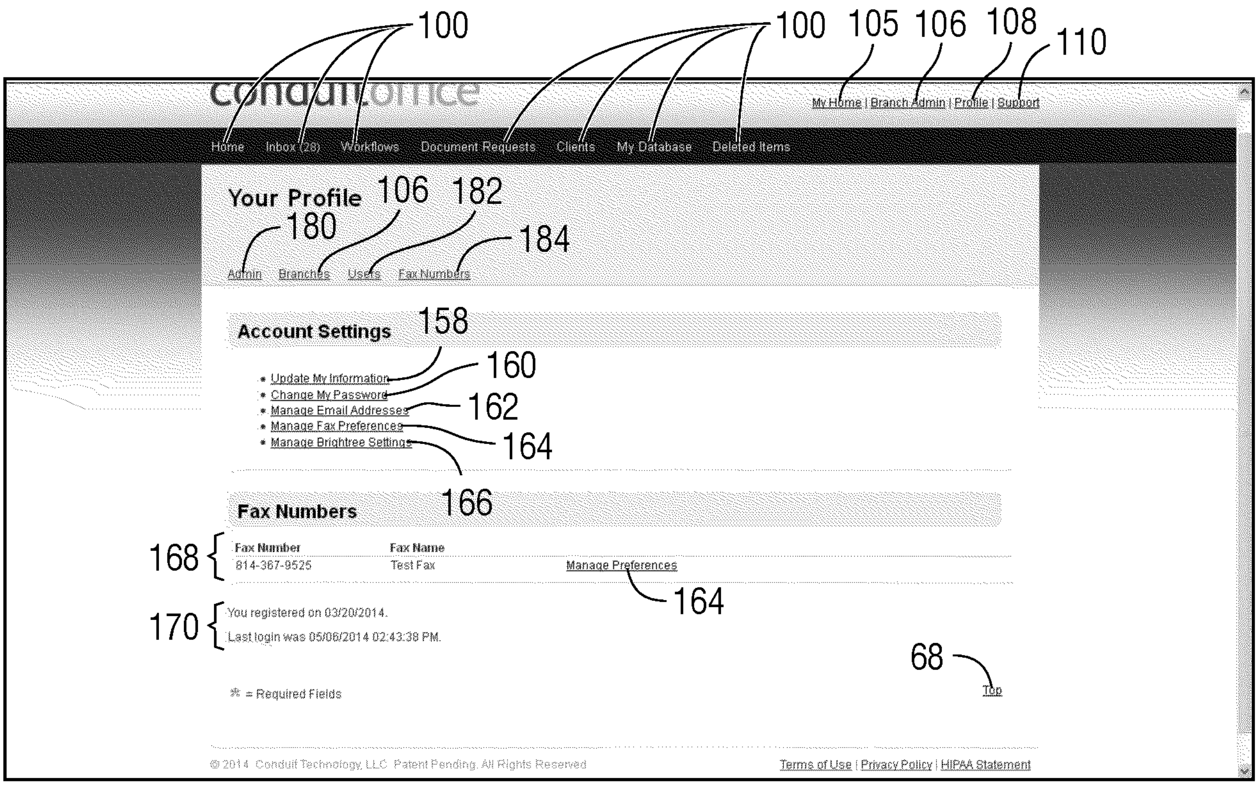

100
100
105
106
108
110
My Home | Branch Admin | Profile | Support
Home
Inbox (28)
Workflows
Document Requests
Clients
My Database
Deleted Items
Your Profile
106
182
180
184
Admin
Branches
Users
Fax Numbers
Account Settings
158
Update My Information
160
Change My Password
Manage Email Addresses
162
Manage Fax Preferences
164
Manage Brightree Settings
166
Fax Numbers
168
Fax Number
Fax Name
814-367-9525
Test Fax
Manage Preferences
164
170
You registered on 03/20/2014.
Last login was 05/06/2014 02:43:38 PM.
68
Top
= Required Fields
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Fig.11

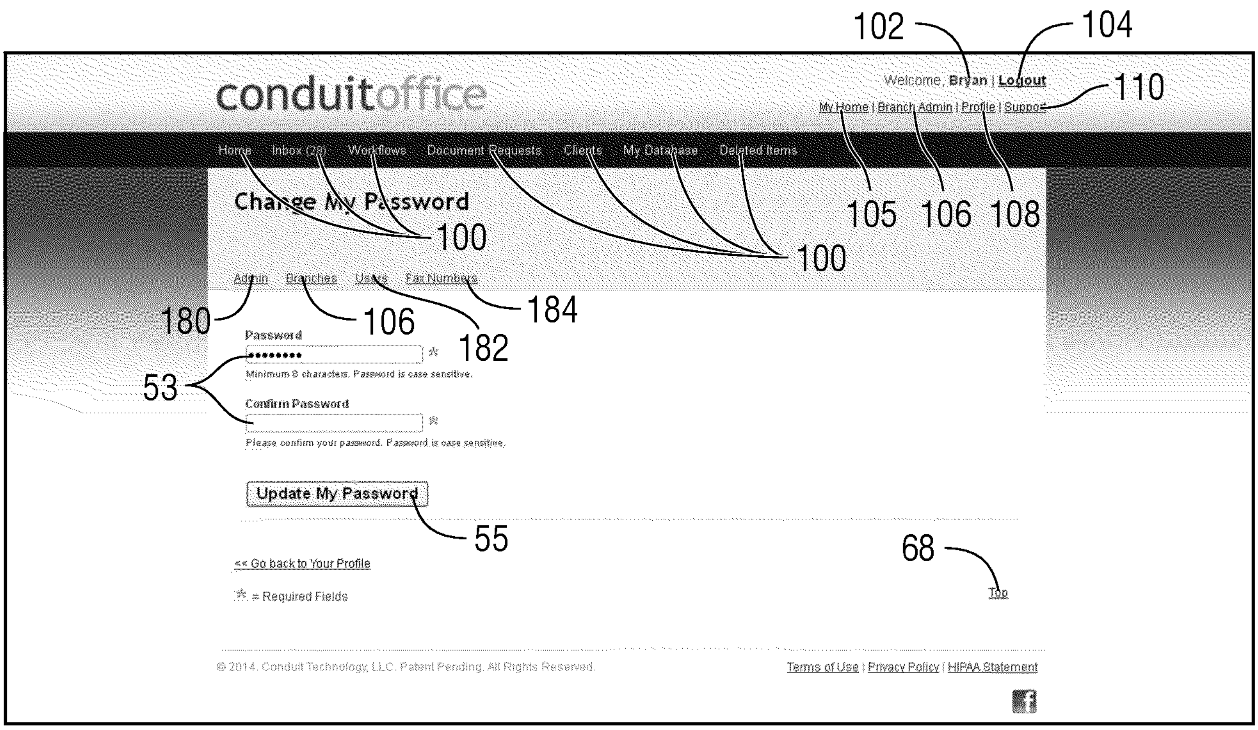
102
104
110
conduitoffice
Welcome, Bryan | Logout
My Home | Branch Admin | Profile | Support
Home
Inbox (28)
Workflows
Document Requests
Clients
My Database
Deleted Items
Change My Password
100
105
106
108
100
Admin
Branches
Users
Fax Numbers
180
106
184
182
Password
Minimum 8 characters. Password is case sensitive.
53
Confirm Password
Please confirm your password. Password is case sensitive.
Update My Password
55
68
<< Go back to Your Profile
Top
= Required Fields
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Fig.12

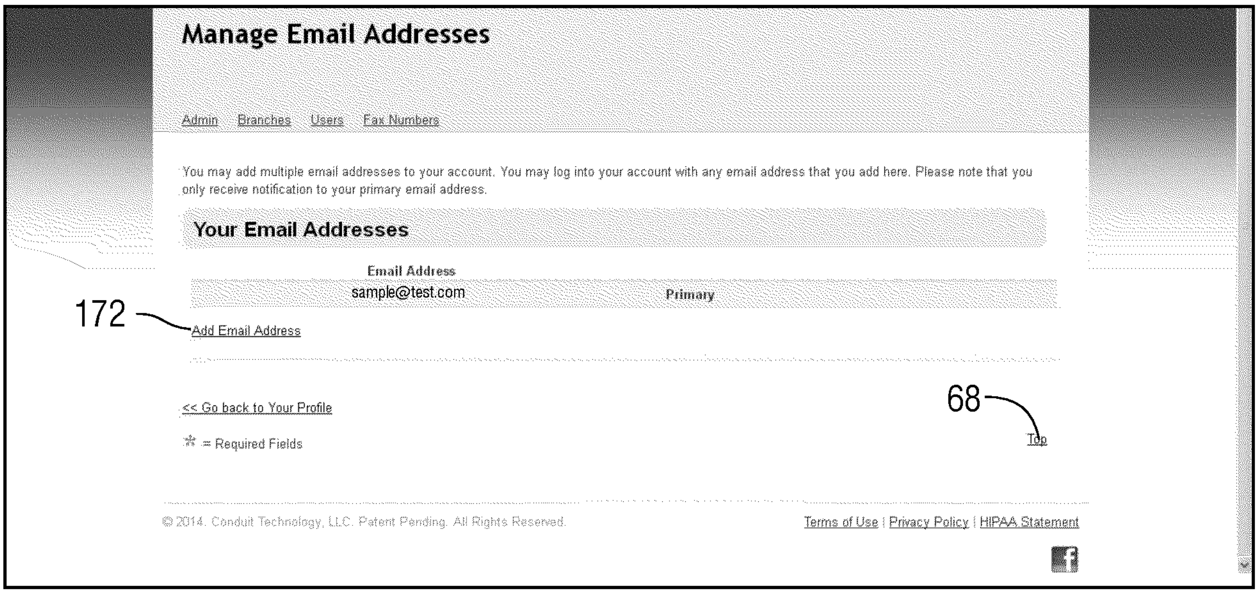
Manage Email Addresses
Admin
Branches
Users
Fax Numbers
You may add multiple email addresses to your account. You may log into your account with any email address that you add here. Please note that you only receive notification to your primary email address.
Your Email Addresses
Email Address
sample@test.com
Primary
172
Add Email Address
<< Go back to Your Profile
68
Top
= Required Fields
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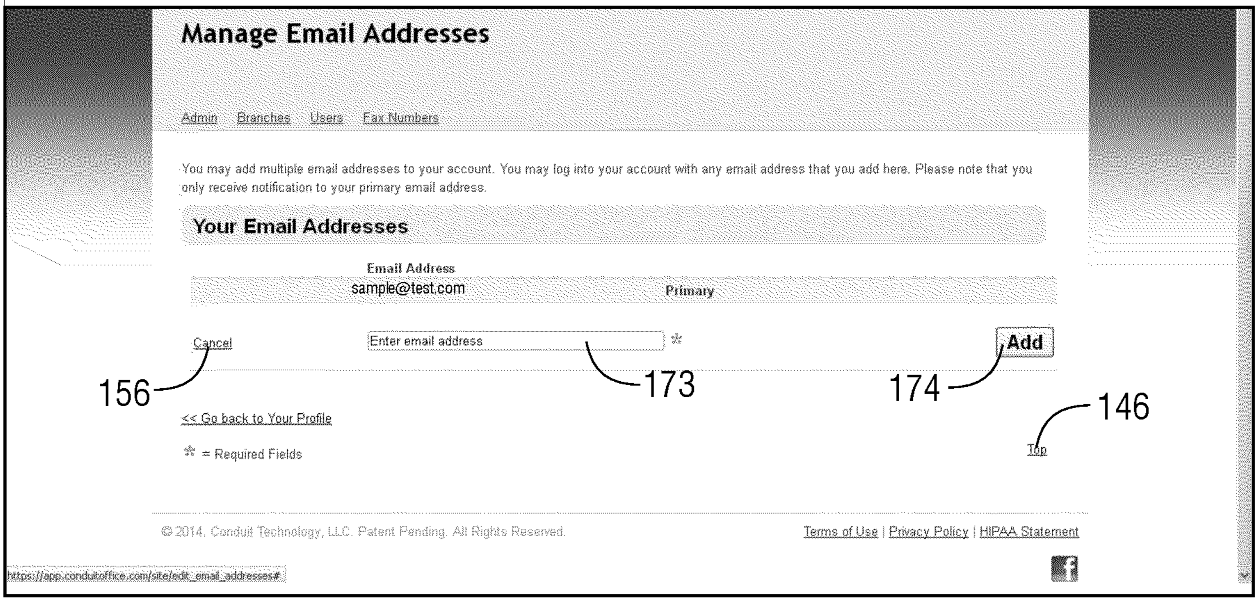
Fig.13



Manage Email Addresses
Admin Branches Users Fax Numbers
You may add multiple email addresses to your account. You may log into your account with any email address that you add here. Please note that you only receive notification to your primary email address.
Your Email Addresses
Email Address
sample@test.com
Primary
Cancel
Enter email address
Add
156
173
174
146
<< Go back to Your Profile
* = Required Fields
Top
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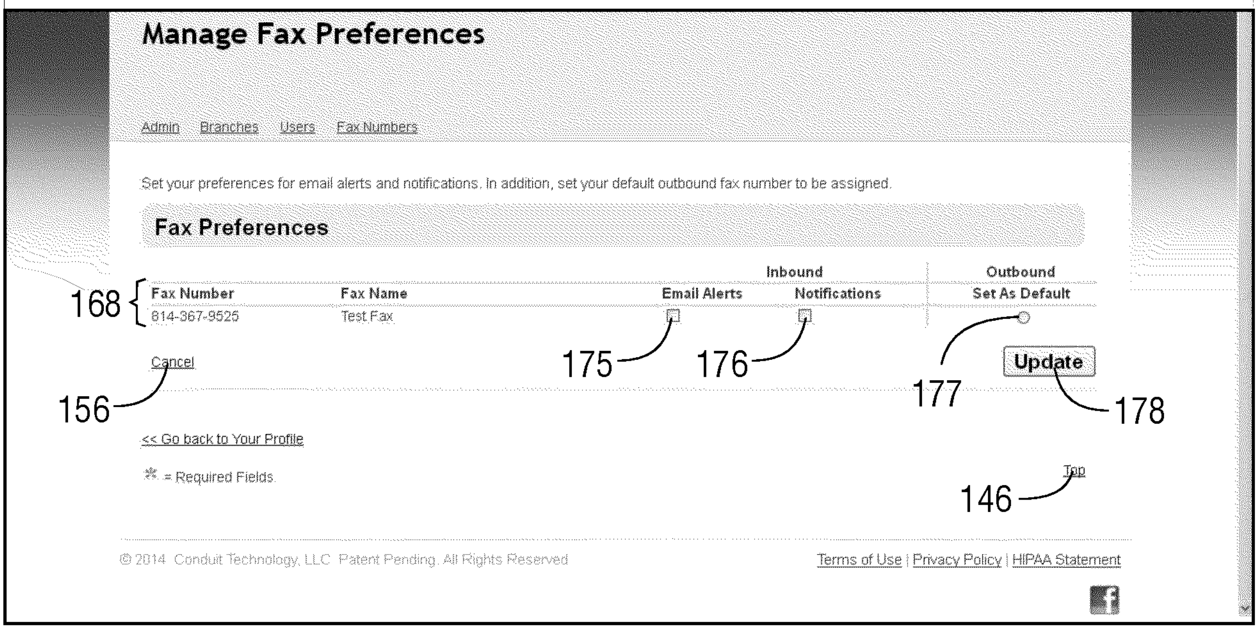
https://app.conduitoffice.com/site/edit_email_addresses#

Fig.14



Manage Fax Preferences
Admin Branches Users Fax Numbers
Set your preferences for email alerts and notifications. In addition, set your default outbound fax number to be assigned.
Fax Preferences
Inbound
Outbound
168
Fax Number
Fax Name
Email Alerts
Notifications
Set As Default
814-367-9525
Test Fax
Cancel
Update
175
176
177
178
156
<< Go back to Your Profile
* = Required Fields
Top
146
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Fig.15

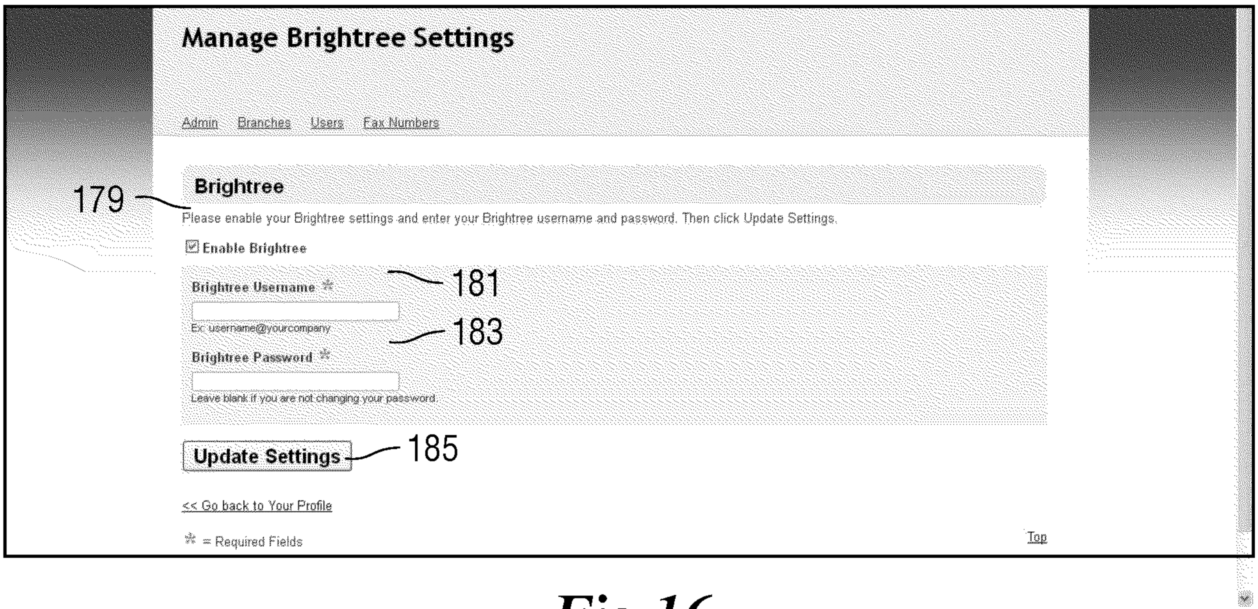

Manage Brightree Settings
Admin Branches Users Fax Numbers
Brightree
Please enable your Brightree settings and enter your Brightree username and password. Then click Update Settings.
Enable Brightree
Brightree Username
Ex: username@yourcompany
Brightree Password
Leave blank if you are not changing your password.
Update Settings
<< Go back to Your Profile
= Required Fields
Top
179
181
183
185

Fig.16

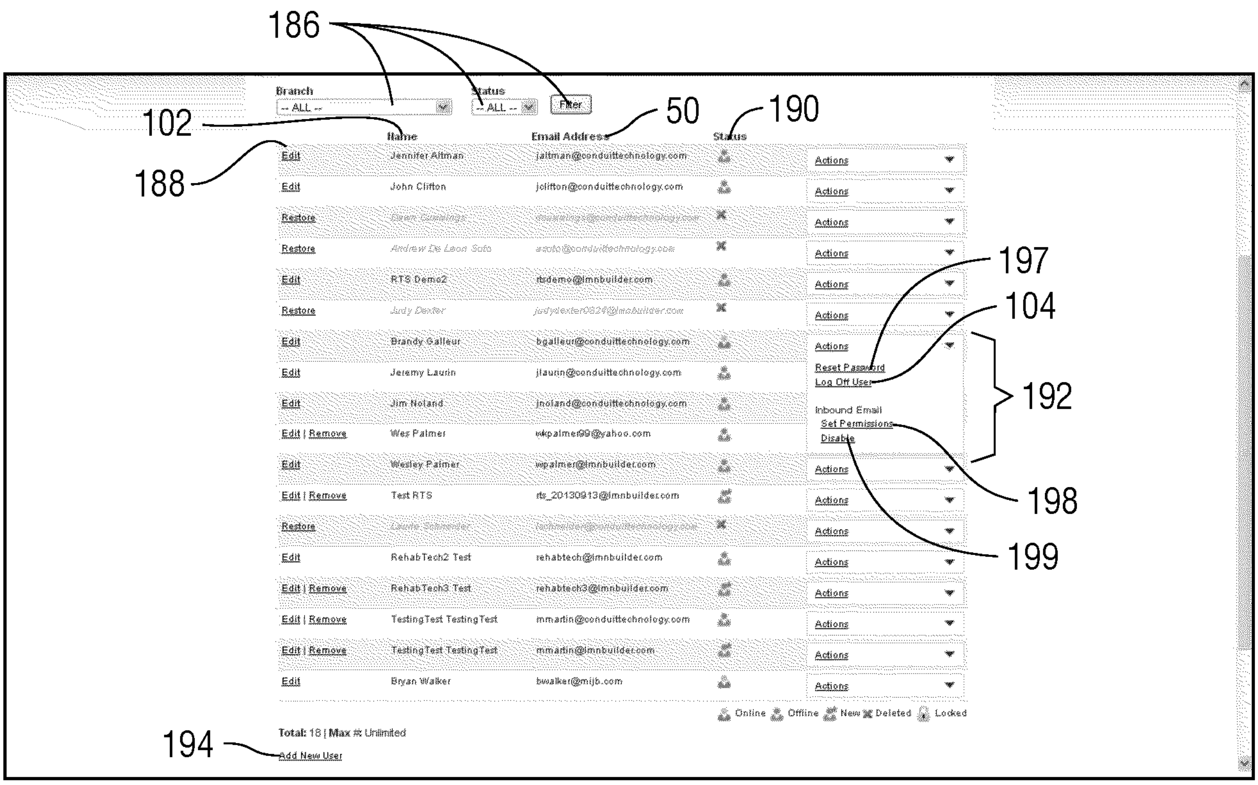
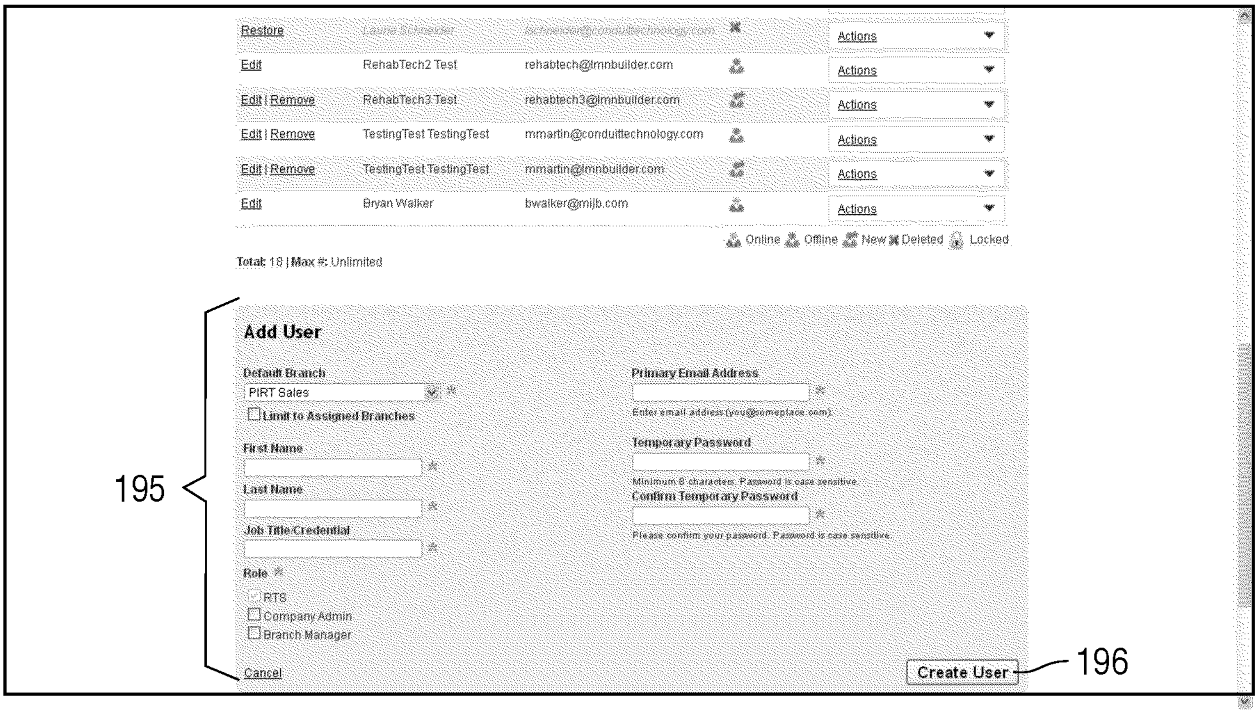
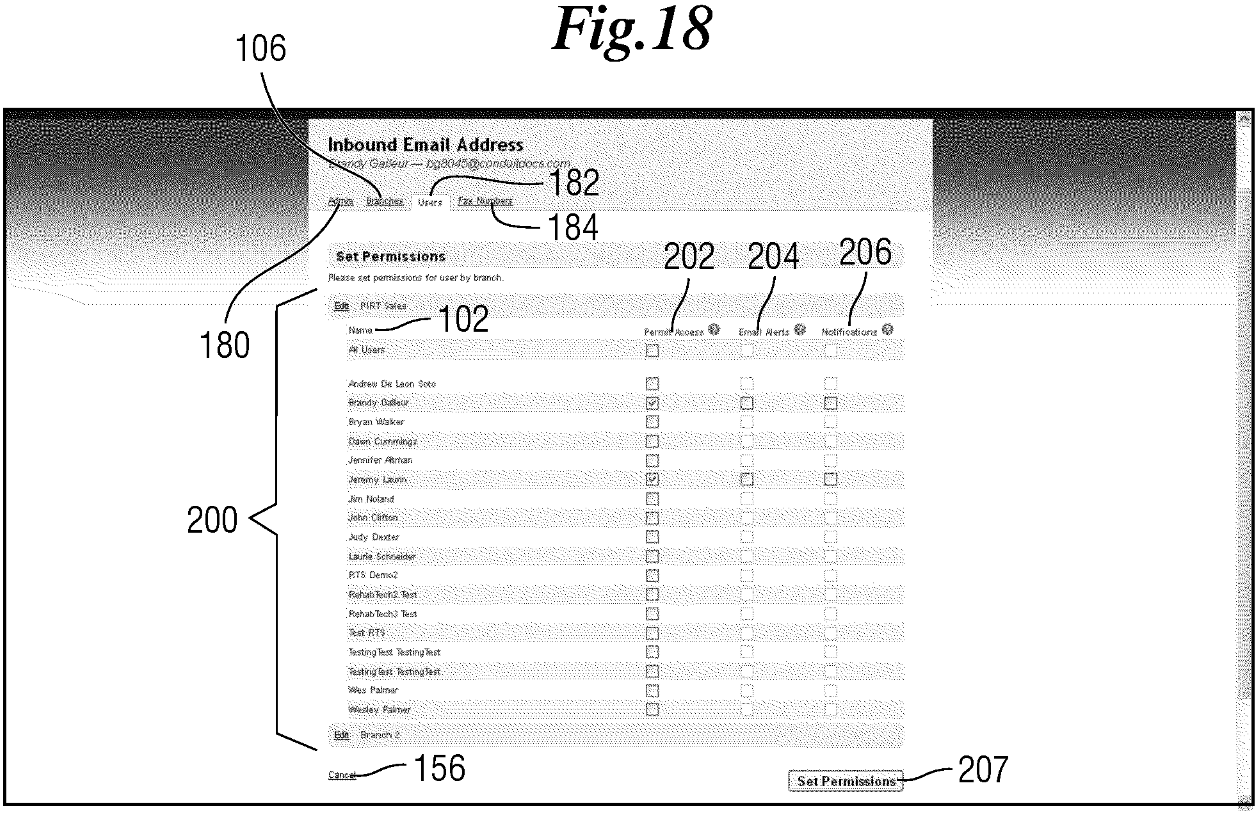

186
Branch
Status
Filter
102
50
190
188
Name
Email Address
Status
Actions
Reset Password
Log Off User
Inbound Email
Set Permissions
Disable
197
104
192
198
199
Online Offline New Deleted Locked
Total: 18 | Max #: Unlimited
Add New User
194

Fig.17



Restore Laurie Schneider lschneider@conduittechnology.com Actions
Edit RehabTech2 Test rehabtech@lmnbuilder.com Actions
Edit | Remove RehabTech3 Test rehabtech3@lmnbuilder.com Actions
Edit | Remove TestingTest TestingTest mmartin@conduittechnology.com Actions
Edit | Remove TestingTest TestingTest mmartin@lmnbuilder.com Actions
Edit Bryan Walker bwalker@mijb.com Actions
Online Offline New Deleted Locked
Total: 18 | Max #: Unlimited
195
Add User
Default Branch
PIRT Sales
Limit to Assigned Branches
First Name
Last Name
Job Title/Credential
Role
RTS
Company Admin
Branch Manager
Primary Email Address
Enter email address (you@someplace.com).
Temporary Password
Minimum 8 characters. Password is case sensitive.
Confirm Temporary Password
Please confirm your password. Password is case sensitive.
Cancel
Create User
196

Fig.18



106
Inbound Email Address
Brandy Galleur — bg8045@conduitdocs.com
Admin Branches Users Fax Numbers
182
184
180
Set Permissions
Please set permissions for user by branch.
202 204 206
Edit PIRT Sales
Name 102
Permit Access Email Alerts Notifications
All Users
Andrew De Leon Soto
Brandy Galleur
Bryan Walker
Dawn Cummings
Jennifer Altman
Jeremy Laurin
Jim Noland
John Clifton
Judy Dexter
Laurie Schneider
RTS Demo2
RehabTech2 Test
RehabTech3 Test
Test RTS
TestingTest TestingTest
TestingTest TestingTest
Wes Palmer
Wesley Palmer
200
Edit Branch 2
Cancel 156
Set Permissions 207

Fig.19

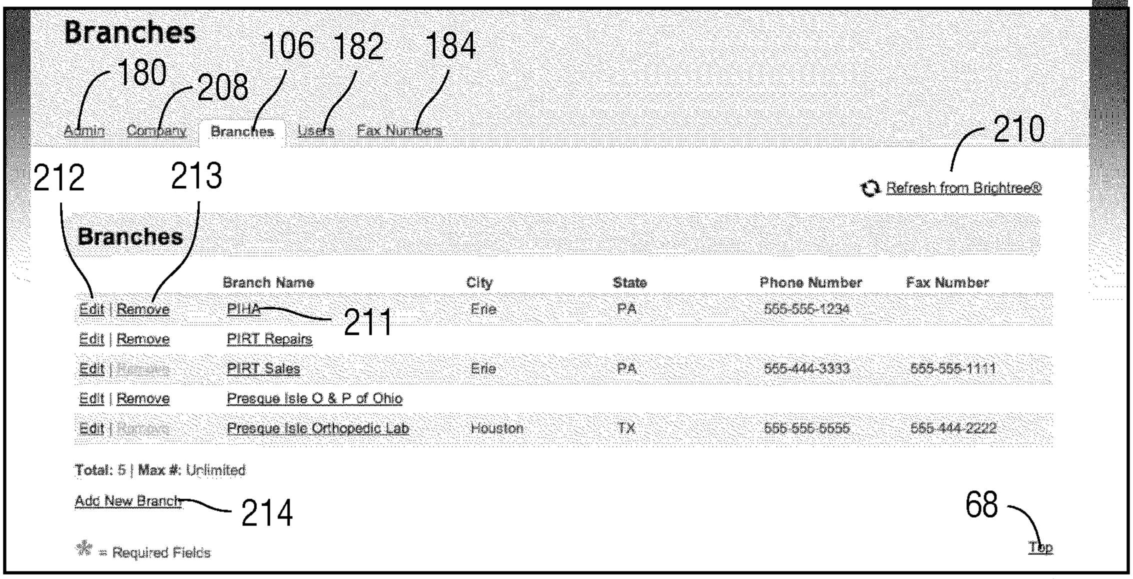

Branches
180
208
106
182
184
Admin
Company
Branches
Users
Fax Numbers
210
Refresh from Brightree®
212
213
Branches
Branch Name
City
State
Phone Number
Fax Number
Edit | Remove
PIHA
211
Erie
PA
555-555-1234
Edit | Remove
PIRT Repairs
Edit |
PIRT Sales
Erie
PA
555-444-3333
555-555-1111
Edit | Remove
Presque Isle O & P of Ohio
Edit |
Presque Isle Orthopedic Lab
Houston
TX
555-555-5555
555-444-2222
Total: 5 | Max #: Unlimited
Add New Branch
214
68
Top
= Required Fields

Fig.20

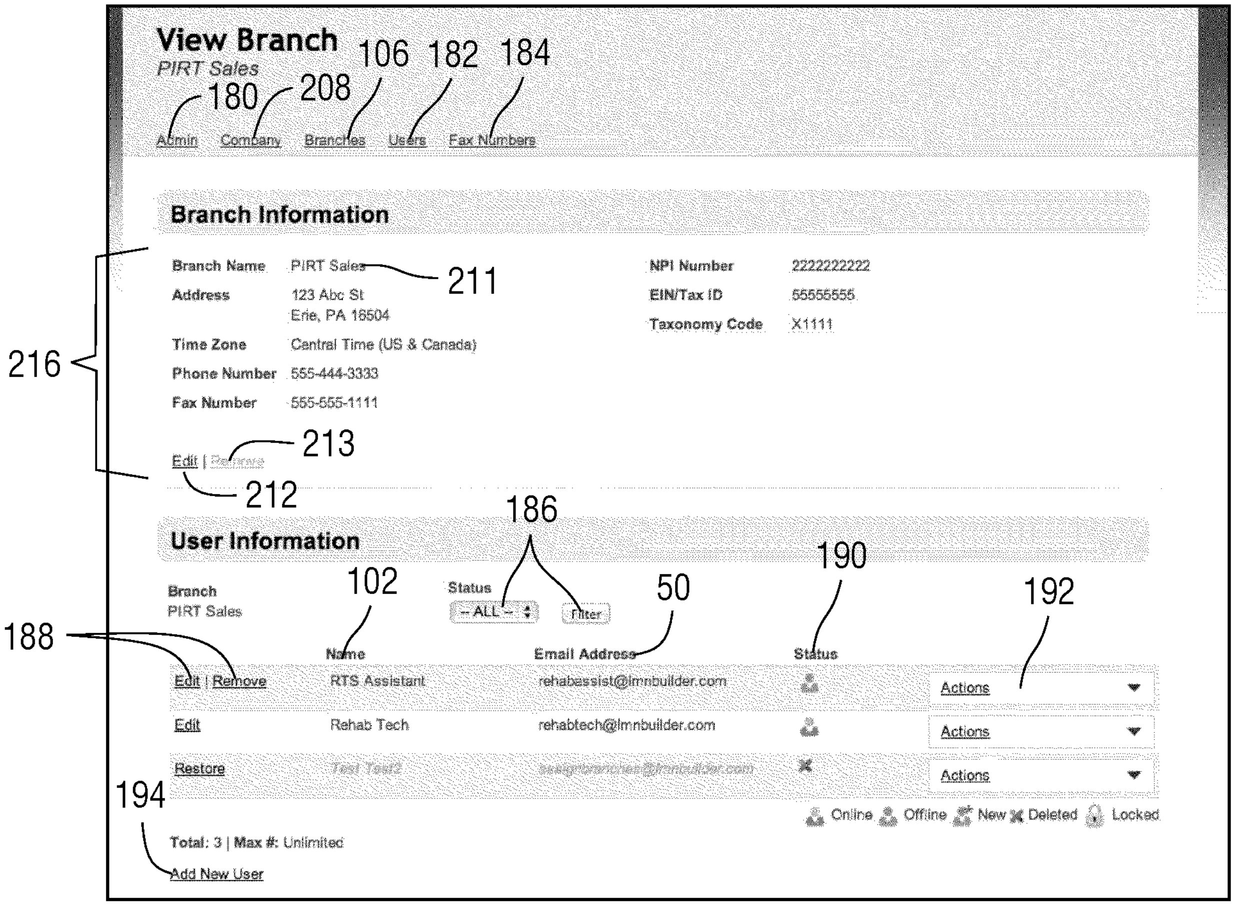
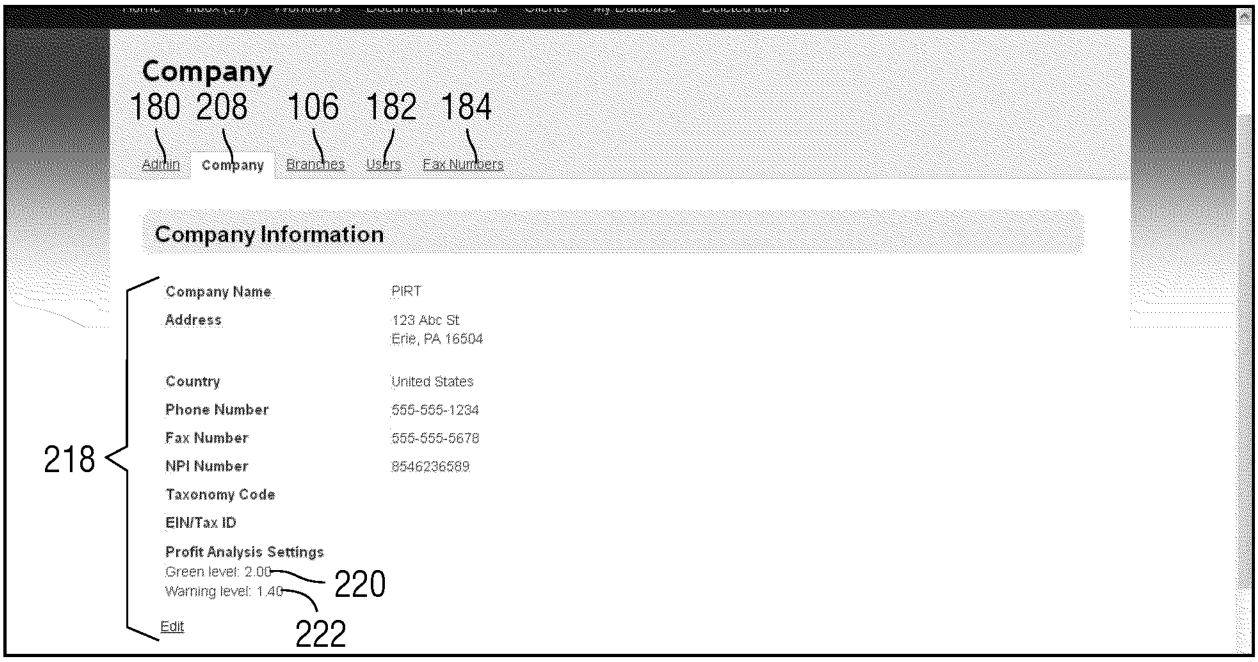

View Branch
PIRT Sales
180
208
106
182
184
Admin
Company
Branches
Users
Fax Numbers
Branch Information
216
Branch Name
PIRT Sales
211
Address
123 Abc St
Erie, PA 16504
Time Zone
Central Time (US & Canada)
Phone Number
555-444-3333
Fax Number
555-555-1111
NPI Number
2222222222
EIN/Tax ID
55555555
Taxonomy Code
X1111
Edit |
213
212
User Information
186
Branch
PIRT Sales
102
Status
-- ALL --
Filter
50
190
192
188
Name
Email Address
Status
Edit | Remove
RTS Assistant
rehabassist@lmnbuilder.com
Actions
Edit
Rehab Tech
rehabtech@lmnbuilder.com
Actions
Restore
Actions
194
Online
Offline
New
Deleted
Locked
Total: 3 | Max #: Unlimited
Add New User

Fig.21


Company
180
208
106
182
184
Admin
Company
Branches
Users
Fax Numbers
Company Information
218
Company Name
PIRT
Address
123 Abc St
Erie, PA 16504
Country
United States
Phone Number
555-555-1234
Fax Number
555-555-5678
NPI Number
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Taxonomy Code
EIN/Tax ID
Profit Analysis Settings
Green level: 2.00
220
Warning level: 1.40
222
Edit

Fig.22

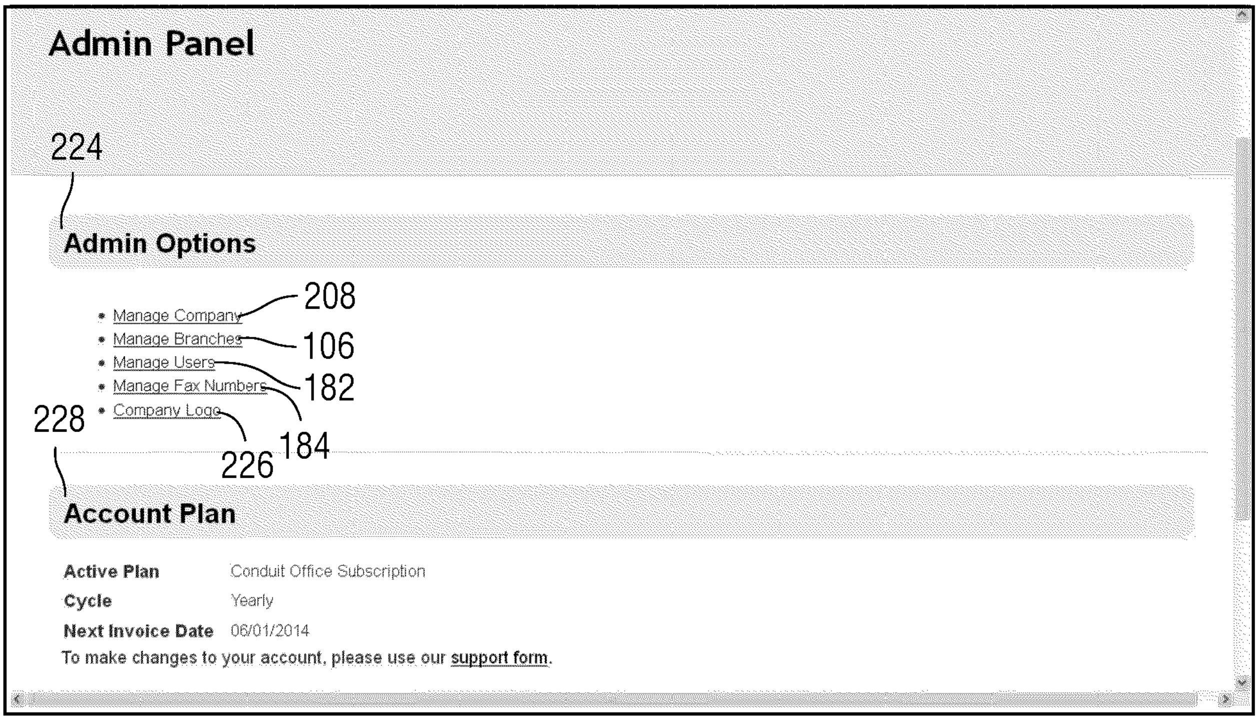
Admin Panel
224
Admin Options
Manage Company
208
Manage Branches
106
Manage Users
182
Manage Fax Numbers
184
Company Logo
226
228
Account Plan
Active Plan
Conduit Office Subscription
Cycle
Yearly
Next Invoice Date
06/01/2014
To make changes to your account, please use our support form.

Fig.23

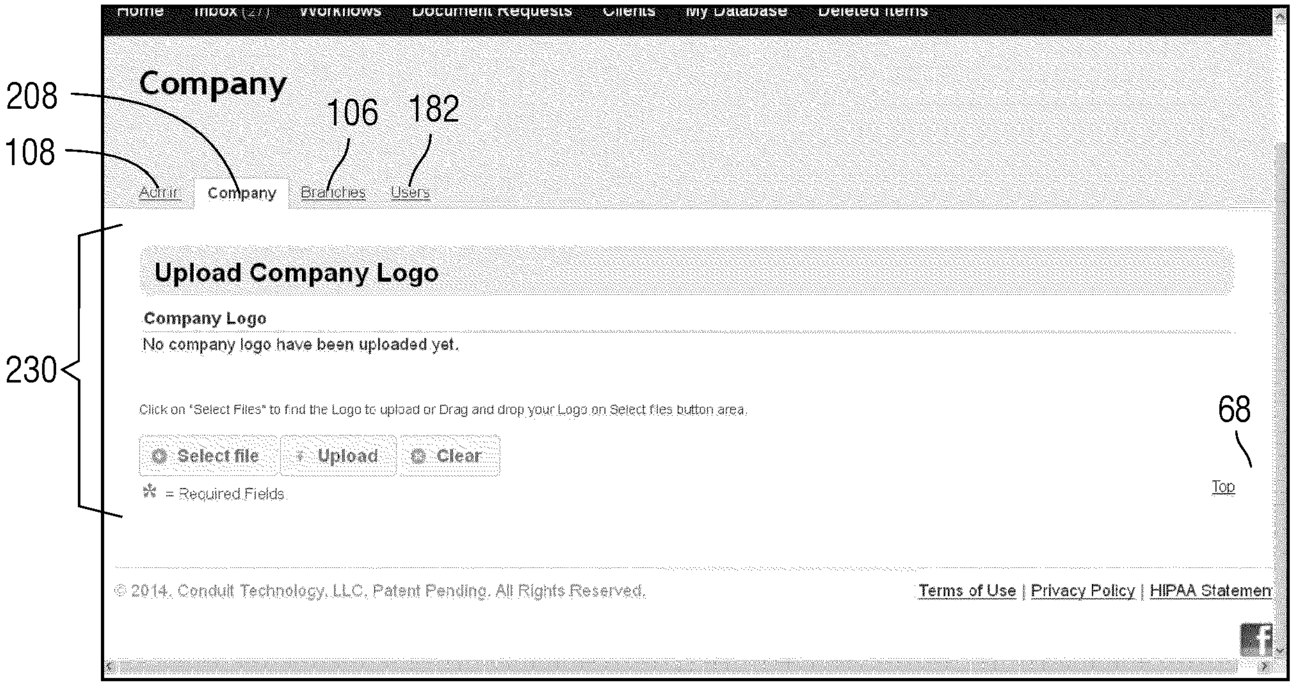
Home
Inbox (27)
Workflows
Document Requests
Clients
My Database
Deleted Items
Company
208
108
106
182
Admin
Company
Branches
Users
Upload Company Logo
Company Logo
No company logo have been uploaded yet.
230
Click on "Select Files" to find the Logo to upload or Drag and drop your Logo on Select files button area.
68
Select file
Upload
Clear
* = Required Fields.
Top
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Fig.24

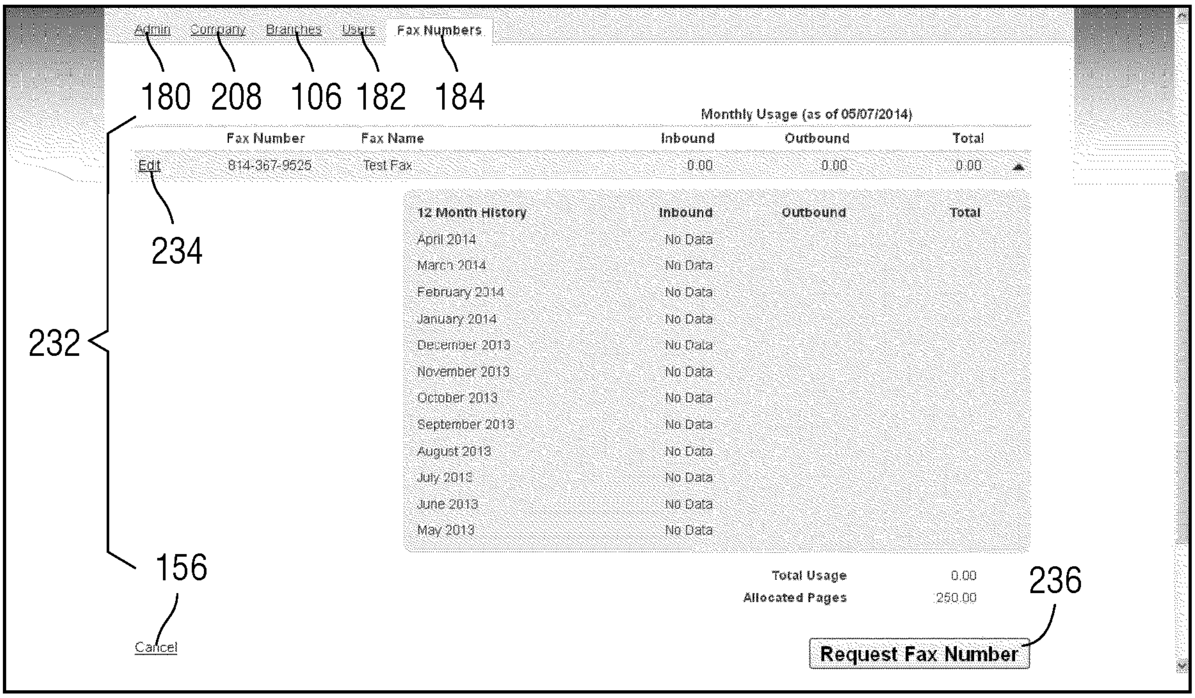
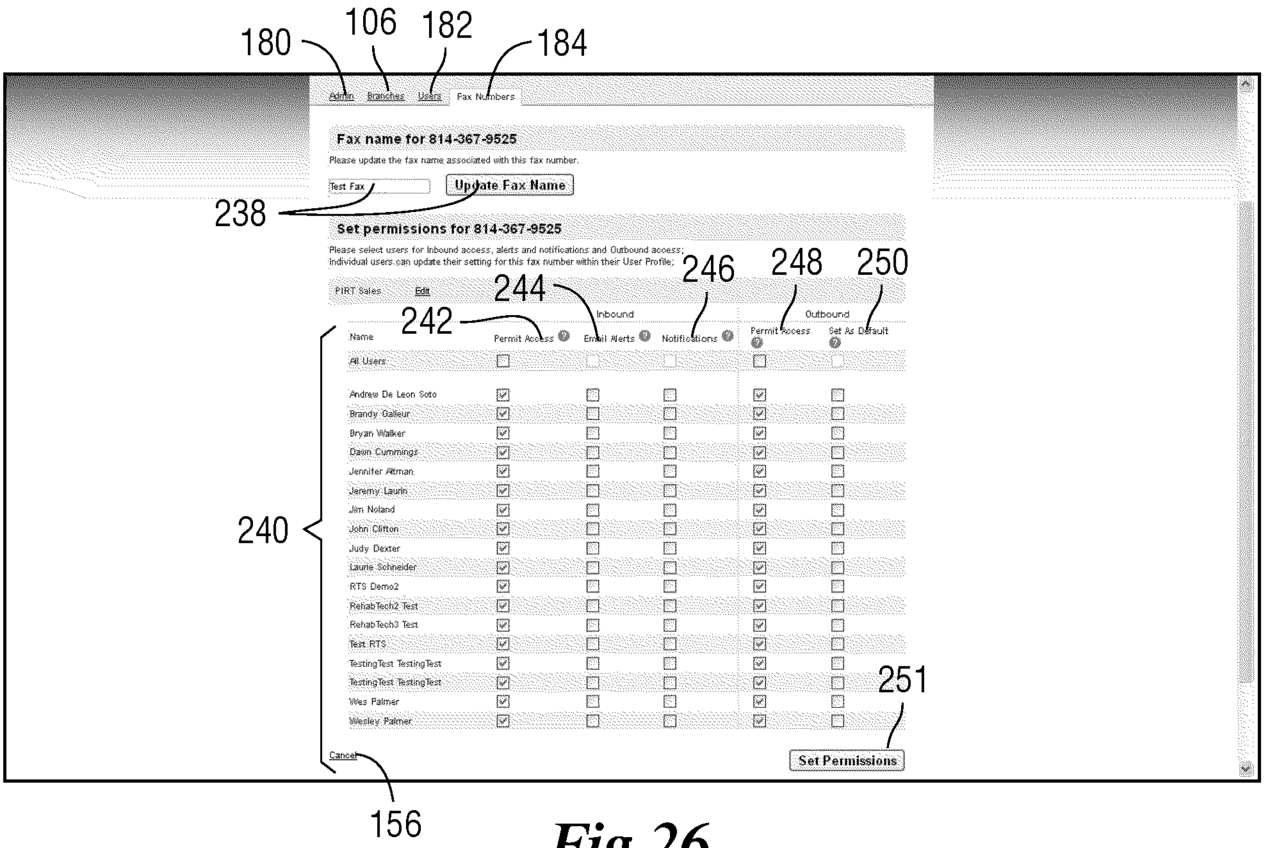
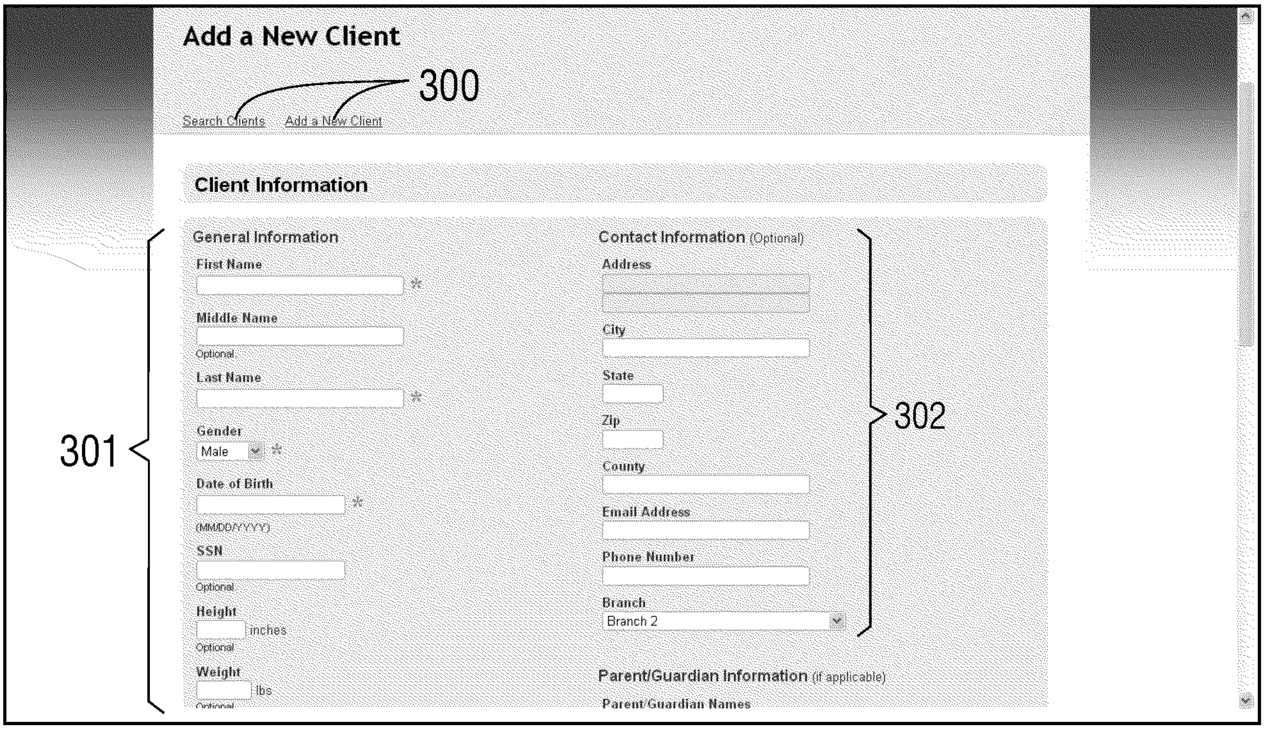

Admin
Company
Branches
Users
Fax Numbers
180
208
106
182
184
Monthly Usage (as of 05/07/2014)
Fax Number
Fax Name
Inbound
Outbound
Total
Edit
814-367-9525
Test Fax
0.00
0.00
0.00
234
12 Month History
Inbound
Outbound
Total
April 2014 No Data
March 2014 No Data
February 2014 No Data
January 2014 No Data
December 2013 No Data
November 2013 No Data
October 2013 No Data
September 2013 No Data
August 2013 No Data
July 2013 No Data
June 2013 No Data
May 2013 No Data
232
156
Total Usage 0.00
Allocated Pages 250.00
236
Cancel
Request Fax Number

Fig.25



180
106
182
184
Admin
Branches
Users
Fax Numbers
Fax name for 814-367-9525
Please update the fax name associated with this fax number.
Test Fax
Update Fax Name
238
Set permissions for 814-367-9525
242
244
246
248
250
Inbound
Outbound
Name
Permit Access
Email Alerts
Notifications
Set As Default
All Users
Andrew De Leon Soto
Brandy Galleur
Bryan Walker
Dawn Cummings
Jennifer Altman
Jeremy Laurin
Jim Noland
John Clifton
Judy Dexter
Laurie Schneider
RTS Demo2
RehabTech2 Test
RehabTech3 Test
Test RTS
TestingTest TestingTest
TestingTest TestingTest
Wes Palmer
Wesley Palmer
240
251
Cancel
Set Permissions
156

Fig.26



Add a New Client
300
Search Clients
Add a New Client
Client Information
General Information
First Name
Middle Name
Optional
Last Name
Gender
Male
Date of Birth
(MM/DD/YYYY)
SSN
Optional
Height
inches
Optional
Weight
lbs
301
Contact Information (Optional)
Address
City
State
Zip
County
Email Address
Phone Number
Branch
Branch 2
302
Parent/Guardian Information (if applicable)
Parent/Guardian Names

Fig.27

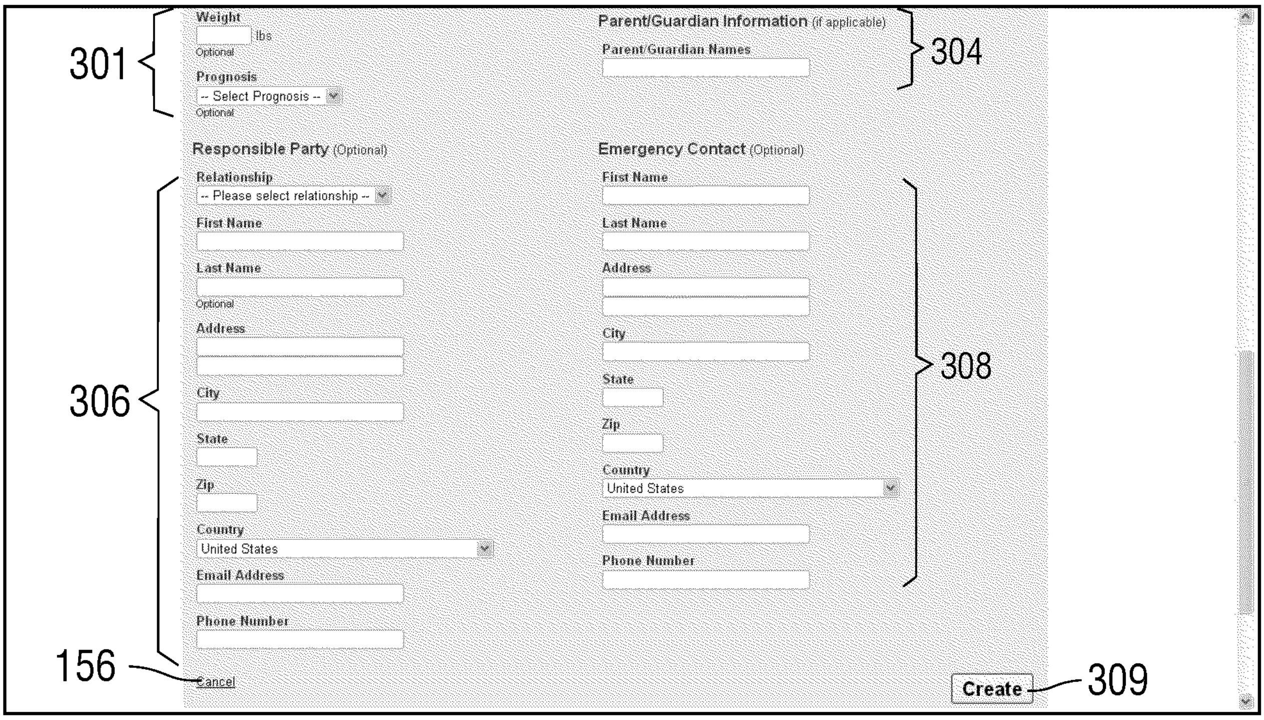

Weight
lbs
Optional
Prognosis
-- Select Prognosis --
Optional
Parent/Guardian Information (if applicable)
Parent/Guardian Names
Responsible Party (Optional)
Relationship
-- Please select relationship --
First Name
Last Name
Optional
Address
City
State
Zip
Country
United States
Email Address
Phone Number
Emergency Contact (Optional)
First Name
Last Name
Address
City
State
Zip
Country
United States
Email Address
Phone Number
Cancel
Create
301
304
306
308
156
309

Fig.28

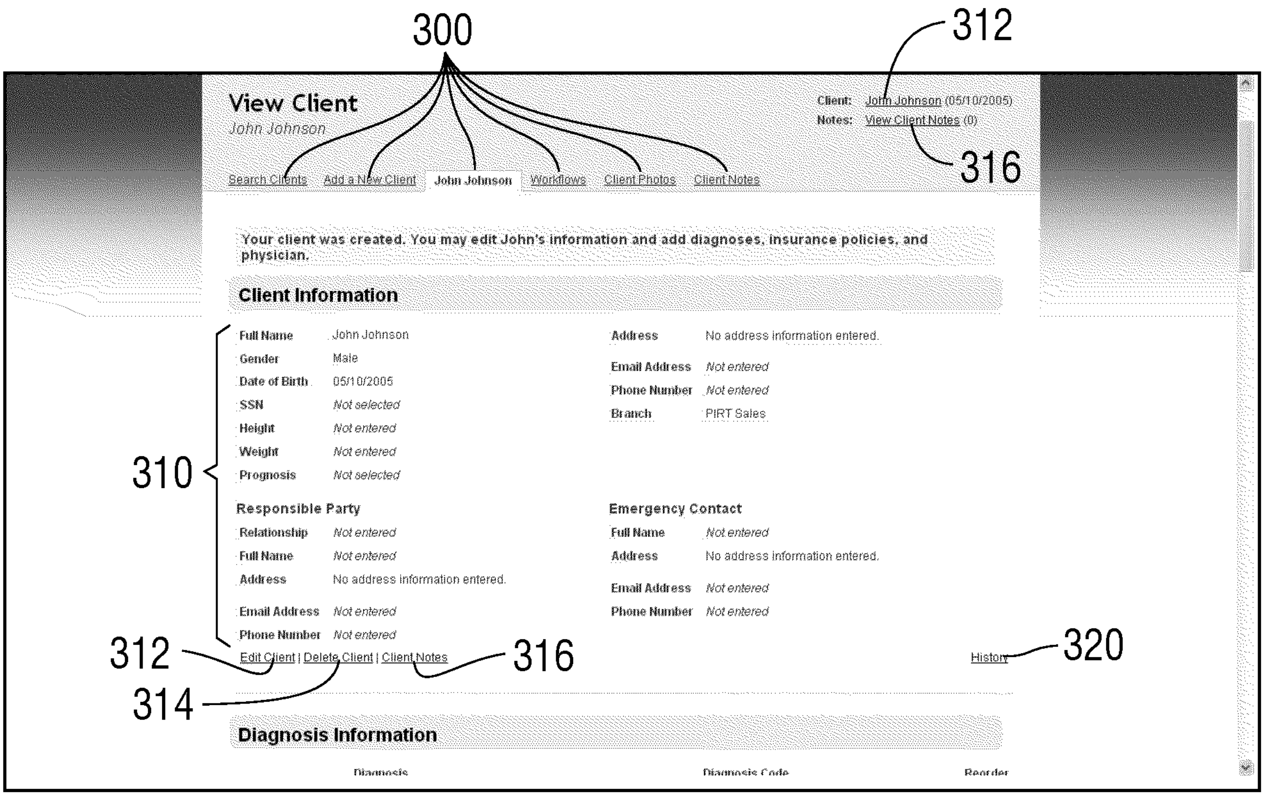

300
312
View Client
John Johnson
Client: John Johnson (05/10/2005)
Notes: View Client Notes (0)
316
Search Clients
Add a New Client
John Johnson
Workflows
Client Photos
Client Notes
Your client was created. You may edit John's information and add diagnoses, insurance policies, and physician.
Client Information
Full Name John Johnson
Gender Male
Date of Birth 05/10/2005
SSN Not selected
Height Not entered
Weight Not entered
Prognosis Not selected
Address No address information entered.
Email Address Not entered
Phone Number Not entered
Branch PIRT Sales
310
Responsible Party
Relationship Not entered
Full Name Not entered
Address No address information entered.
Email Address Not entered
Phone Number Not entered
Emergency Contact
Full Name Not entered
Address No address information entered.
Email Address Not entered
Phone Number Not entered
Edit Client | Delete Client | Client Notes
History
312
314
316
320
Diagnosis Information
Diagnosis
Diagnosis Code
Reorder

Fig.29

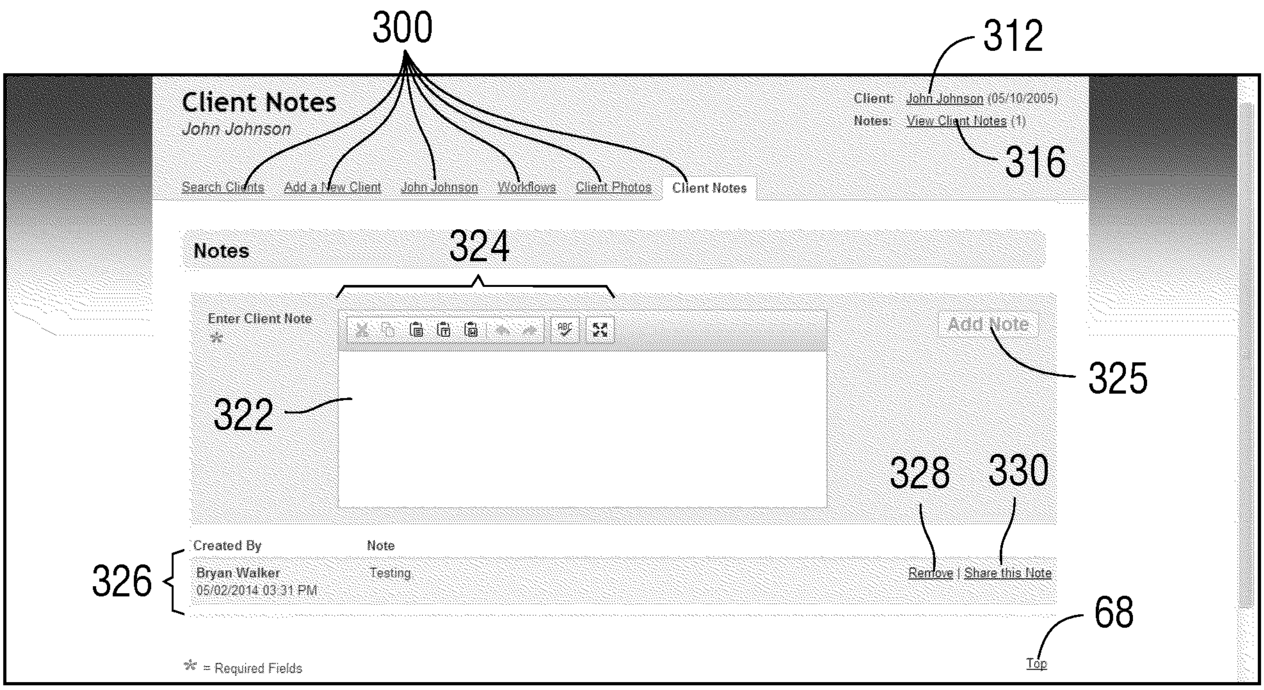

300
312
Client Notes
John Johnson
Client: John Johnson (05/10/2005)
Notes: View Client Notes (1)
316
Search Clients
Add a New Client
John Johnson
Workflows
Client Photos
Client Notes
Notes
324
Enter Client Note
Add Note
325
322
328
330
Created By
Note
326
Bryan Walker
05/02/2014 03:31 PM
Testing
Remove | Share this Note
68
Top
= Required Fields

Fig.30

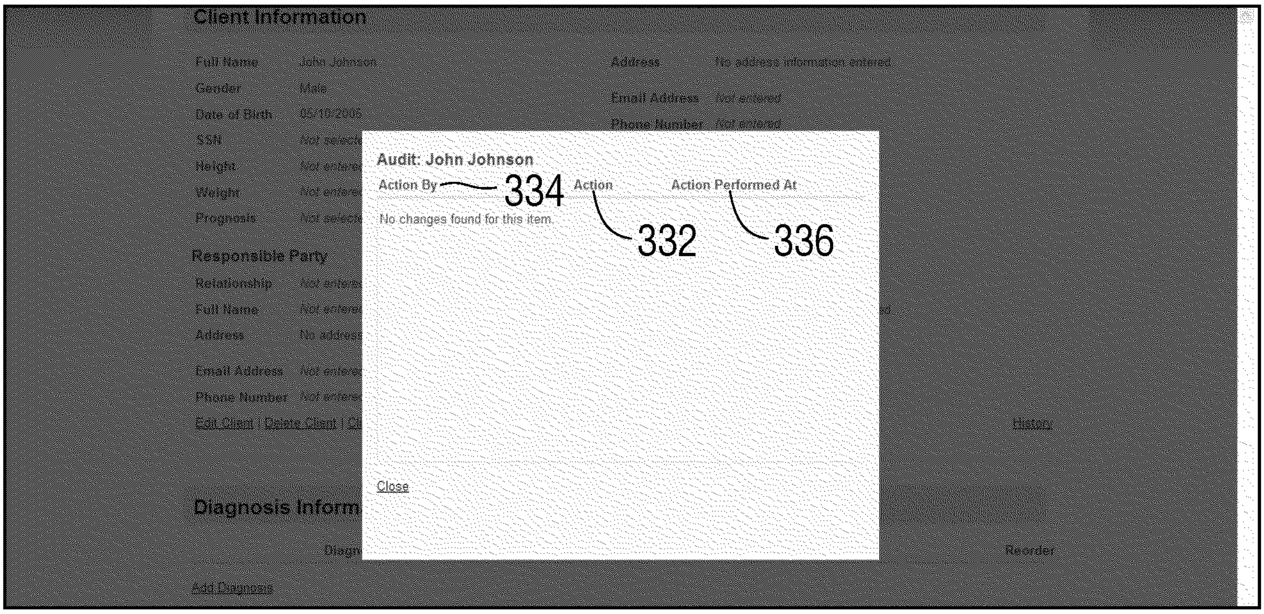
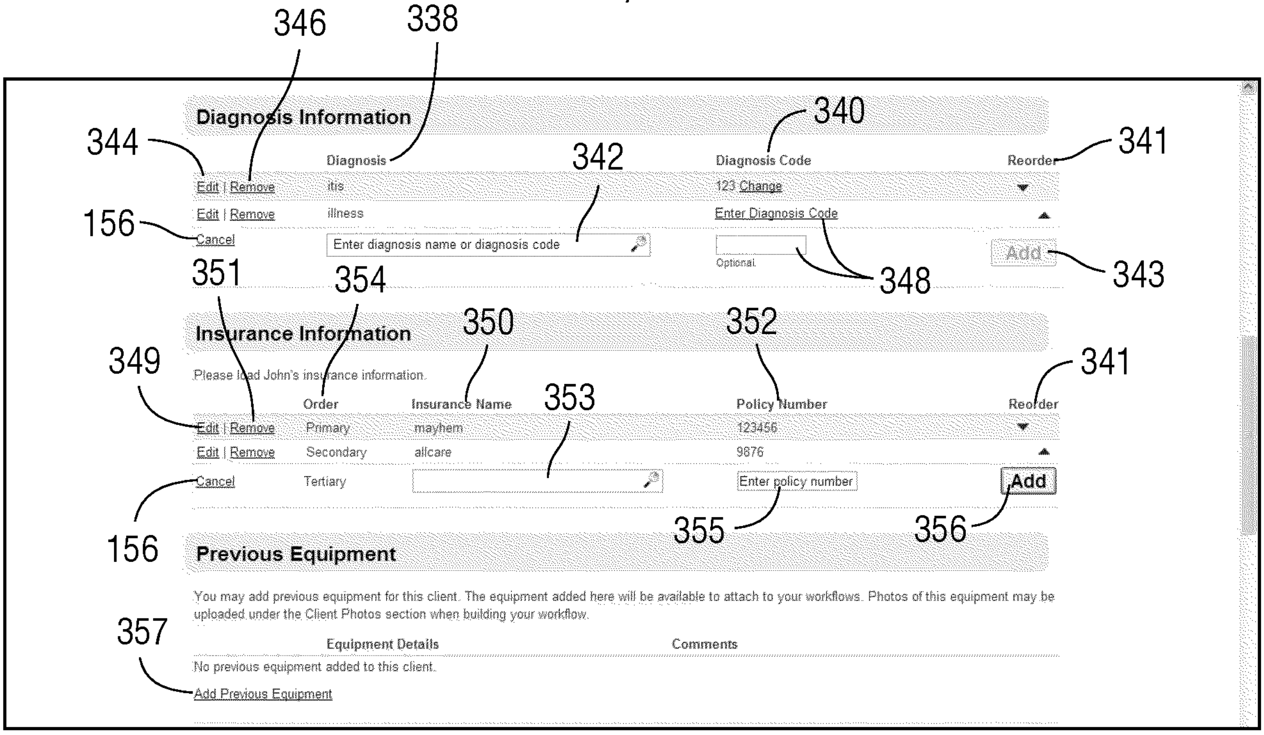
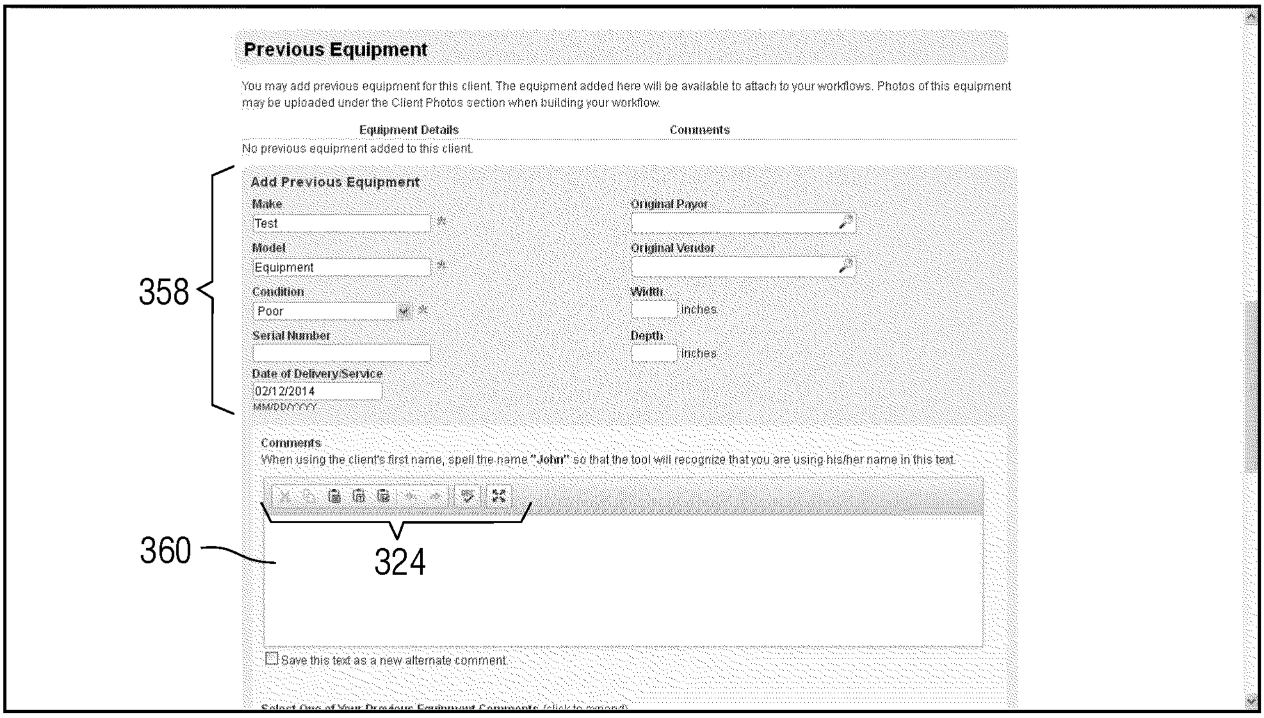

Client Information
Full Name
John Johnson
Gender
Male
Date of Birth
05/10/2005
Address
No address information entered
Email Address
Not entered
Phone Number
Not entered
Audit: John Johnson
Action By
334
Action
Action Performed At
No changes found for this item.
332
336
Responsible Party
Relationship
Full Name
Address
Email Address
Phone Number
Edit Client | Delete Client
History
Close
Diagnosis Inform
Reorder
Add Diagnosis

Fig.31



Diagnosis Information
Diagnosis
Diagnosis Code
Reorder
Edit | Remove
itis
123 Change
Edit | Remove
illness
Enter Diagnosis Code
Cancel
Enter diagnosis name or diagnosis code
Optional
Add
Insurance Information
Please load John's insurance information.
Order
Insurance Name
Policy Number
Reorder
Edit | Remove
Primary
mayhem
123456
Edit | Remove
Secondary
allcare
9876
Cancel
Tertiary
Enter policy number
Add
Previous Equipment
You may add previous equipment for this client. The equipment added here will be available to attach to your workflows. Photos of this equipment may be uploaded under the Client Photos section when building your workflow.
Equipment Details
Comments
No previous equipment added to this client.
Add Previous Equipment
346
338
340
341
344
342
156
348
343
351
354
350
352
349
341
353
355
356
156
357

Fig.32



Previous Equipment
You may add previous equipment for this client. The equipment added here will be available to attach to your workflows. Photos of this equipment may be uploaded under the Client Photos section when building your workflow.
Equipment Details
Comments
No previous equipment added to this client.
Add Previous Equipment
Make
Test
Original Payor
Model
Equipment
Original Vendor
Condition
Poor
Width
inches
Serial Number
Depth
inches
Date of Delivery/Service
02/12/2014
MM/DD/YYYY
Comments
When using the client's first name, spell the name "John" so that the tool will recognize that you are using his/her name in this text.
Save this text as a new alternate comment.
358
360
324

Fig.33

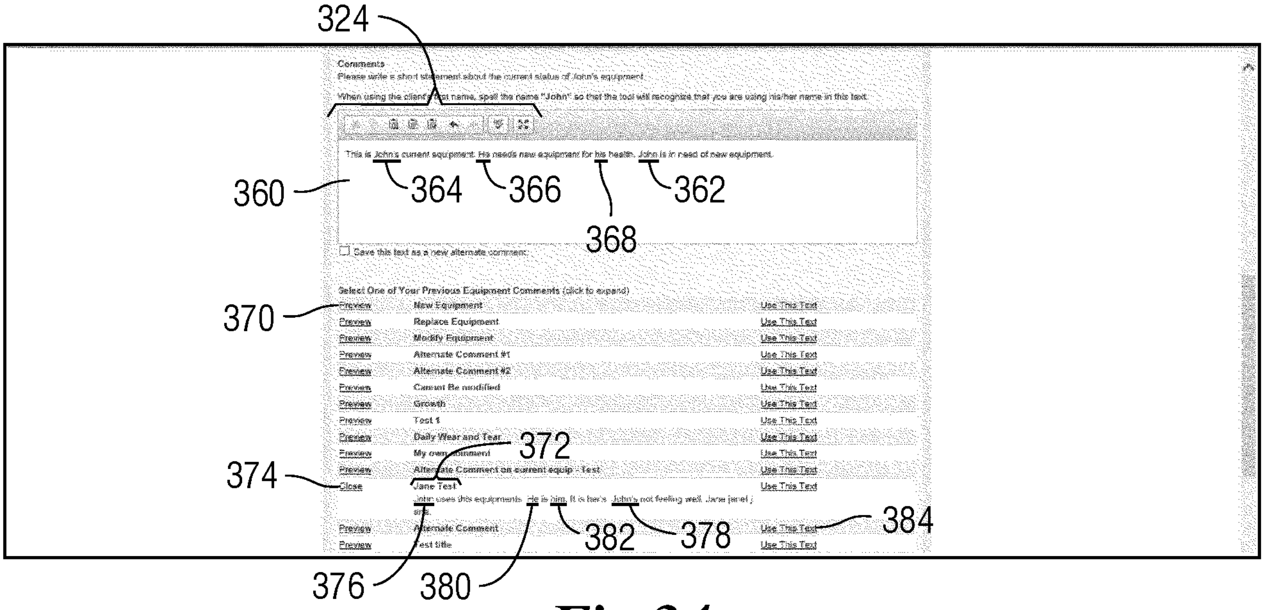

324
Comments
Please write a short statement about the current status of John's equipment.
When using the client's first name, spell the name "John" so that the tool will recognize that you are using his/her name in this text.
This is John's current equipment. He needs new equipment for his health. John is in need of new equipment.
360
364
366
362
368
Save this text as a new alternate comment
Select One of Your Previous Equipment Comments (click to expand)
370
Preview
New Equipment
Use This Text
Replace Equipment
Modify Equipment
Alternate Comment #1
Alternate Comment #2
Cannot Be modified
Growth
Test 1
Daily Wear and Tear
My own comment
Alternate Comment on current equip - Test
372
374
Close
Jane Test
Alternate Comment
Test title
384
382
378
376
380

Fig.34

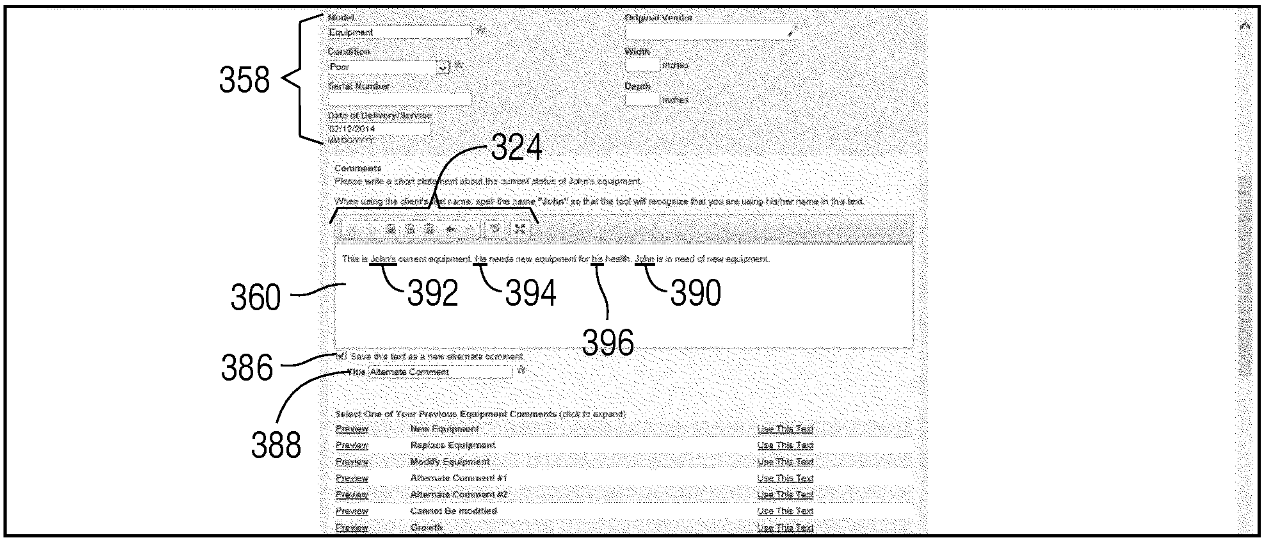

Model
Equipment
Original Vendor
Condition
Poor
Width
inches
Serial Number
Depth
Date of Delivery/Service
02/12/2014
358
324
Comments
Please write a short statement about the current status of John's equipment.
When using the client's first name, spell the name "John" so that the tool will recognize that you are using his/her name in this text.
This is John's current equipment. He needs new equipment for his health. John is in need of new equipment.
360
392
394
390
396
386
Save this text as a new alternate comment
Title
Alternate Comment
388
Select One of Your Previous Equipment Comments (click to expand)
Preview
New Equipment
Use This Text
Replace Equipment
Modify Equipment
Alternate Comment #1
Alternate Comment #2
Cannot Be modified
Growth

Fig.35

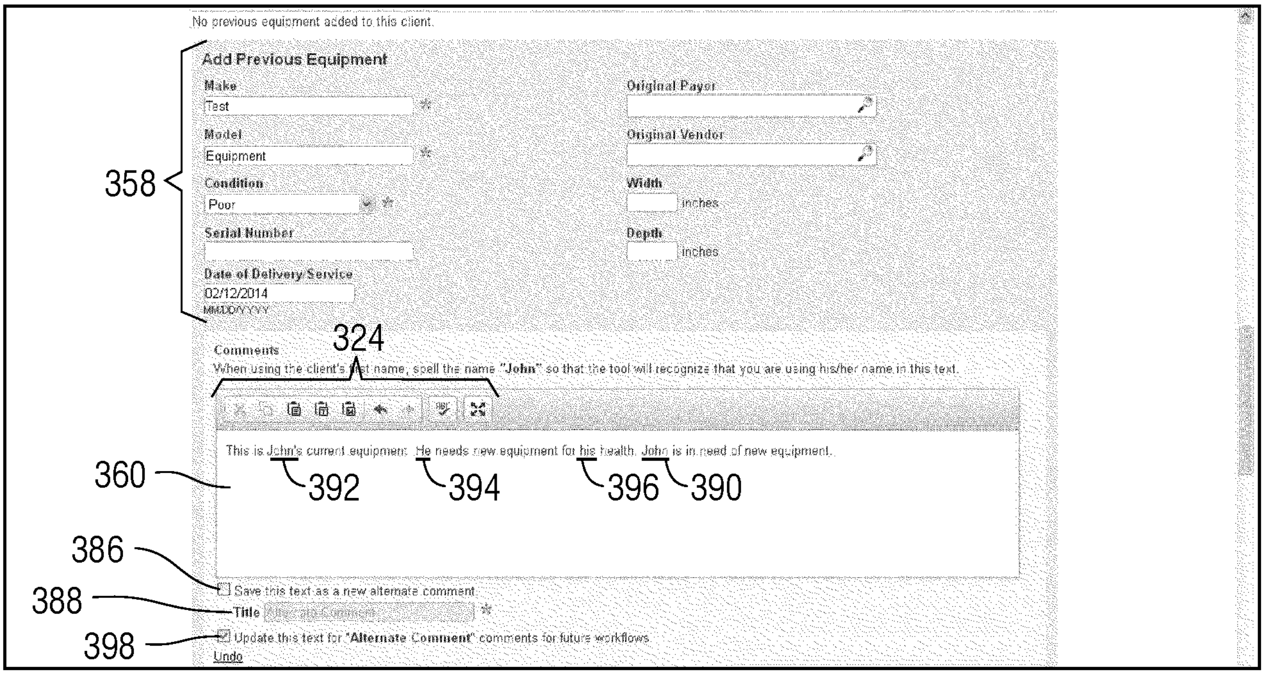

No previous equipment added to this client.
Add Previous Equipment
Make
Test
Model
Equipment
Condition
Poor
Serial Number
Date of Delivery/Service
02/12/2014
MM/DD/YYYY
Original Payor
Original Vendor
Width
inches
Depth
inches
Comments
When using the client's first name, spell the name "John" so that the tool will recognize that you are using his/her name in this text.
This is John's current equipment. He needs new equipment for his health. John is in need of new equipment.
Save this text as a new alternate comment
Title
Update this text for "Alternate Comment" comments for future workflows
Undo
358
324
360
392
394
396
390
386
388
398

Fig.36

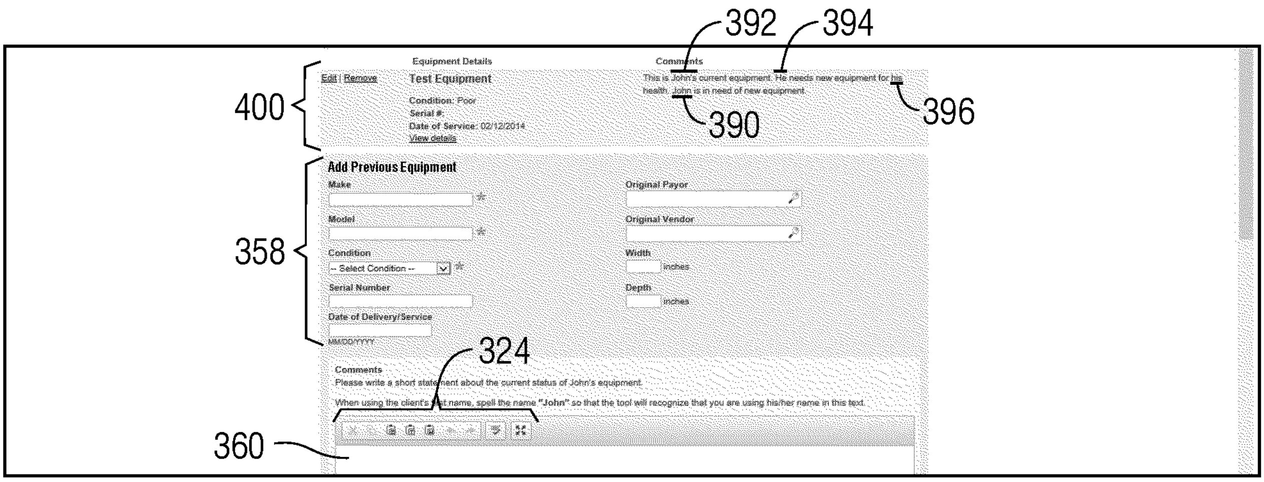

Equipment Details
Edit | Remove
Test Equipment
Condition: Poor
Serial #:
Date of Service: 02/12/2014
View details
Comments
This is John's current equipment. He needs new equipment for his health. John is in need of new equipment.
Add Previous Equipment
Make
Model
Condition
-- Select Condition --
Serial Number
Date of Delivery/Service
MM/DD/YYYY
Original Payor
Original Vendor
Width
inches
Depth
inches
Comments
Please write a short statement about the current status of John's equipment.
When using the client's first name, spell the name "John" so that the tool will recognize that you are using his/her name in this text.
392
394
400
390
396
358
324
360

Fig.37

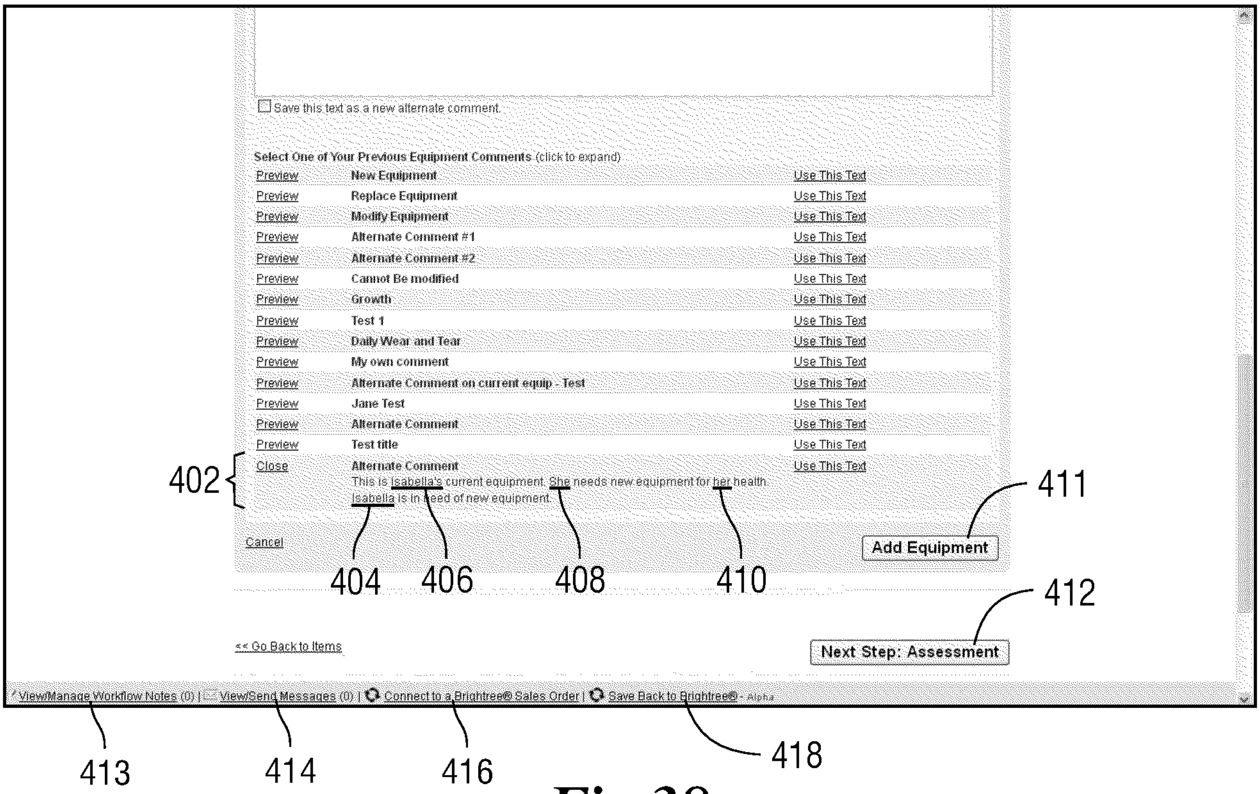

Save this text as a new alternate comment.
Select One of Your Previous Equipment Comments (click to expand)
Preview New Equipment Use This Text
Preview Replace Equipment Use This Text
Preview Modify Equipment Use This Text
Preview Alternate Comment #1 Use This Text
Preview Alternate Comment #2 Use This Text
Preview Cannot Be modified Use This Text
Preview Growth Use This Text
Preview Test 1 Use This Text
Preview Daily Wear and Tear Use This Text
Preview My own comment Use This Text
Preview Alternate Comment on current equip - Test Use This Text
Preview Jane Test Use This Text
Preview Alternate Comment Use This Text
Preview Test title Use This Text
Close Alternate Comment Use This Text
This is Isabella's current equipment. She needs new equipment for her health.
Isabella is in need of new equipment.
402
404
406
408
410
411
Cancel
Add Equipment
412
<< Go Back to Items
Next Step: Assessment
View/Manage Workflow Notes (0) | View/Send Messages (0) | Connect to a Brightree® Sales Order | Save Back to Brightree® - Alpha
413
414
416
418

Fig.38

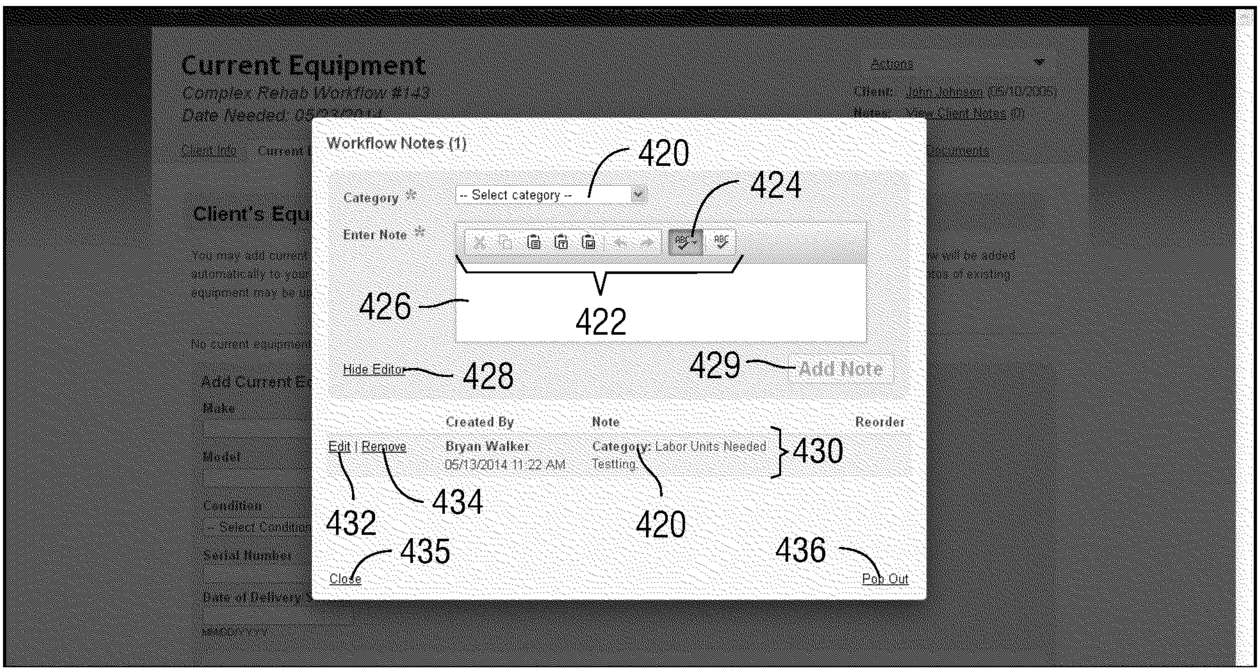

Current Equipment
Complex Rehab Workflow #143
Actions
Client: John Johnson (05/10/2005)
Notes: View Client Notes (0)
Workflow Notes (1)
Category
-- Select category --
420
424
Enter Note
426
422
Hide Editor
428
429
Add Note
Created By
Note
Reorder
Edit | Remove
Bryan Walker
05/13/2014 11:22 AM
Category: Labor Units Needed
Testting.
430
432
434
420
435
436
Close
Pop Out

Fig.39

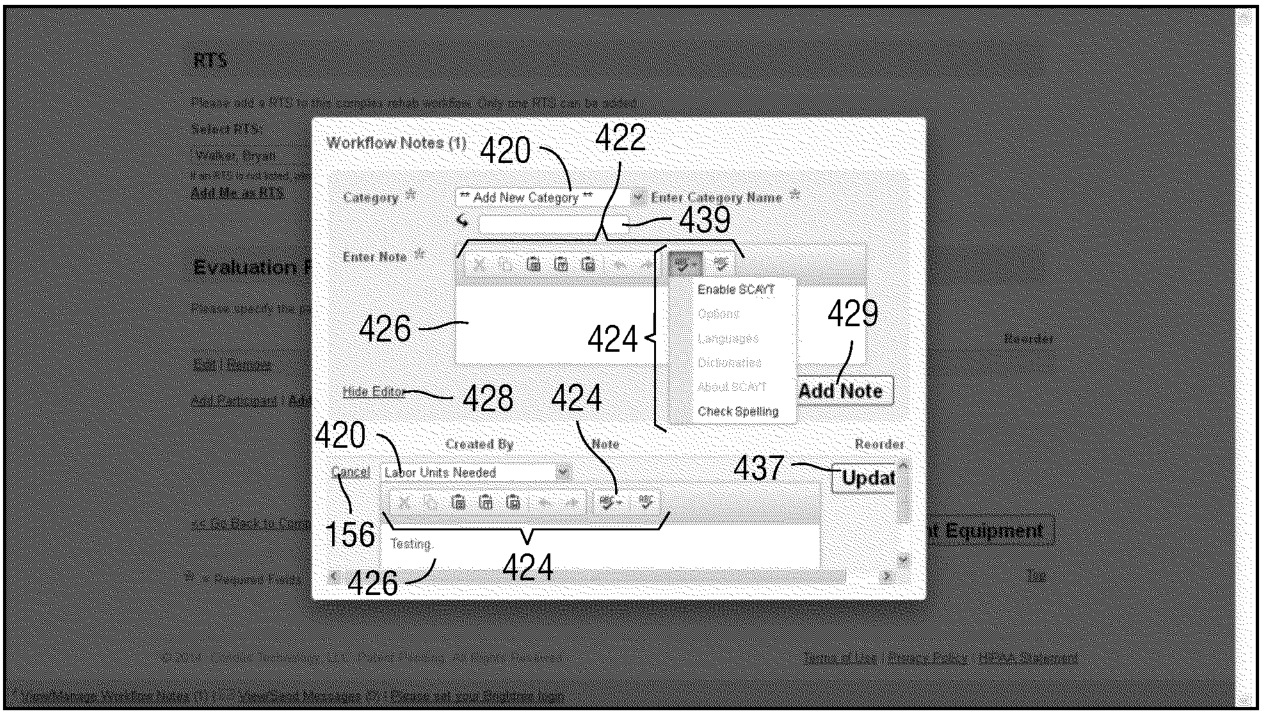

RTS
Workflow Notes (1)
420
422
Category
** Add New Category **
Enter Category Name
439
Enter Note
Evaluation
426
424
Enable SCAYT
Options
Languages
Dictionaries
About SCAYT
Check Spelling
429
Add Note
Hide Editor
428
424
420
Created By
Note
Reorder
Cancel
Labor Units Needed
437
Updat
156
Testing.
424
426
t Equipment

Fig.40

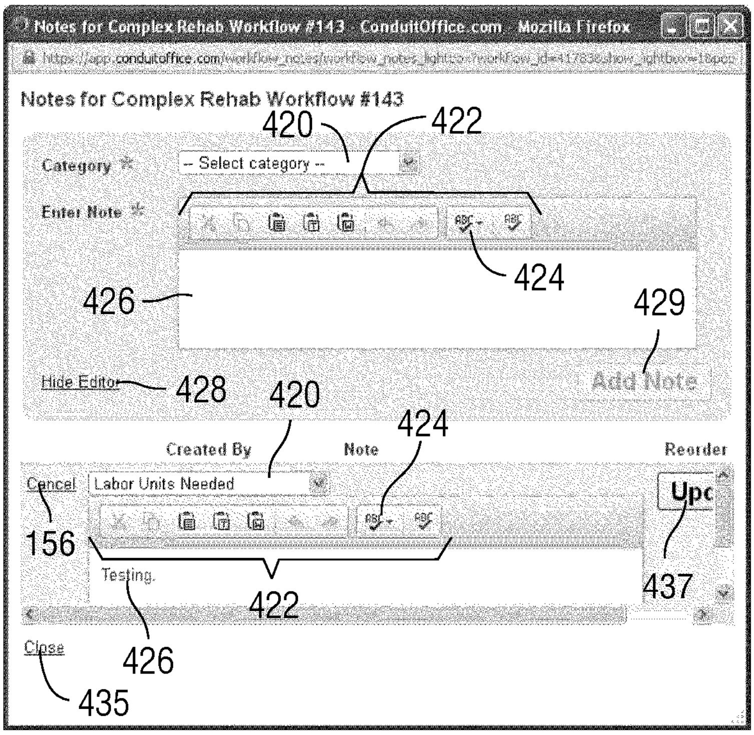

Notes for Complex Rehab Workflow #143 - ConduitOffice.com - Mozilla Firefox
Notes for Complex Rehab Workflow #143
420
422
Category
-- Select category --
Enter Note
424
426
429
Hide Editor
428
420
Add Note
424
Created By
Note
Reorder
Cancel
Labor Units Needed
Upc
156
Testing.
422
437
Close
426
435

Fig.41

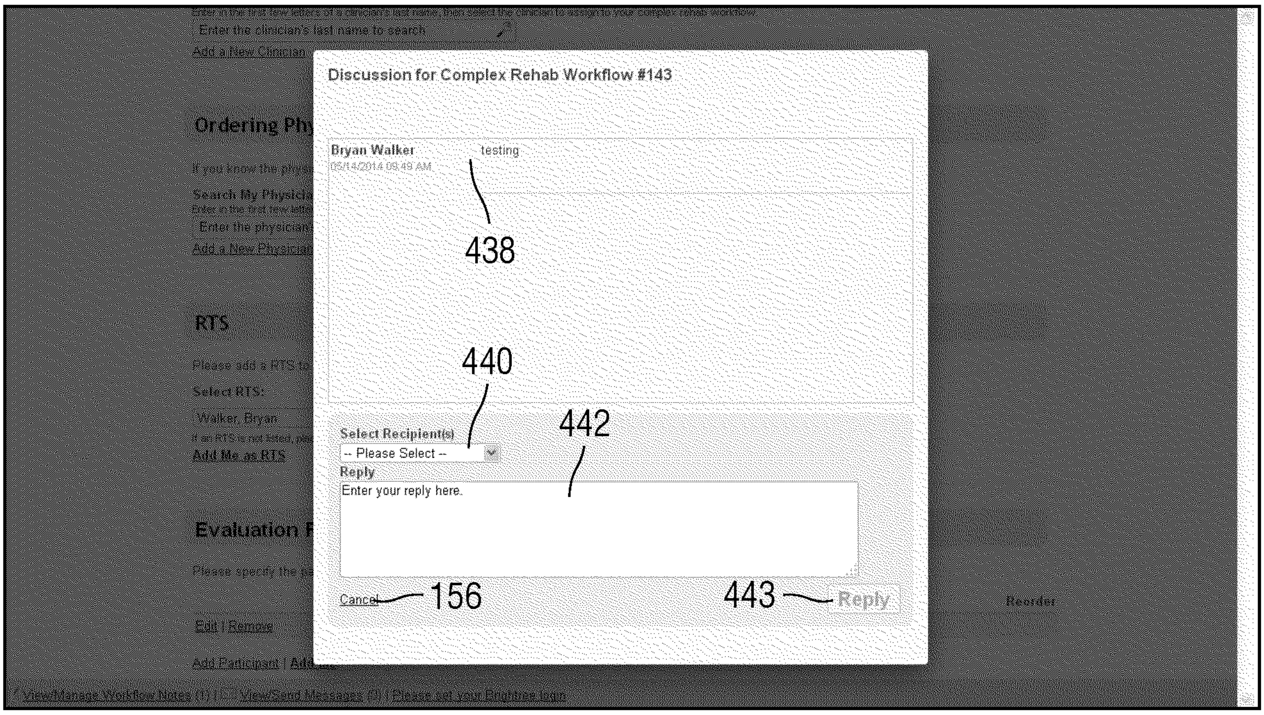

Discussion for Complex Rehab Workflow #143
Bryan Walker
testing
438
440
442
Select Recipient(s)
-- Please Select --
Reply
Enter your reply here.
Cancel
156
443
Reply
Ordering Phy
RTS
Select RTS:
Walker, Bryan
Add Me as RTS
Evaluation F
Reorder
Edit | Remove
Add Participant
Add a New Clinician
Enter the clinician's last name to search

Fig.42

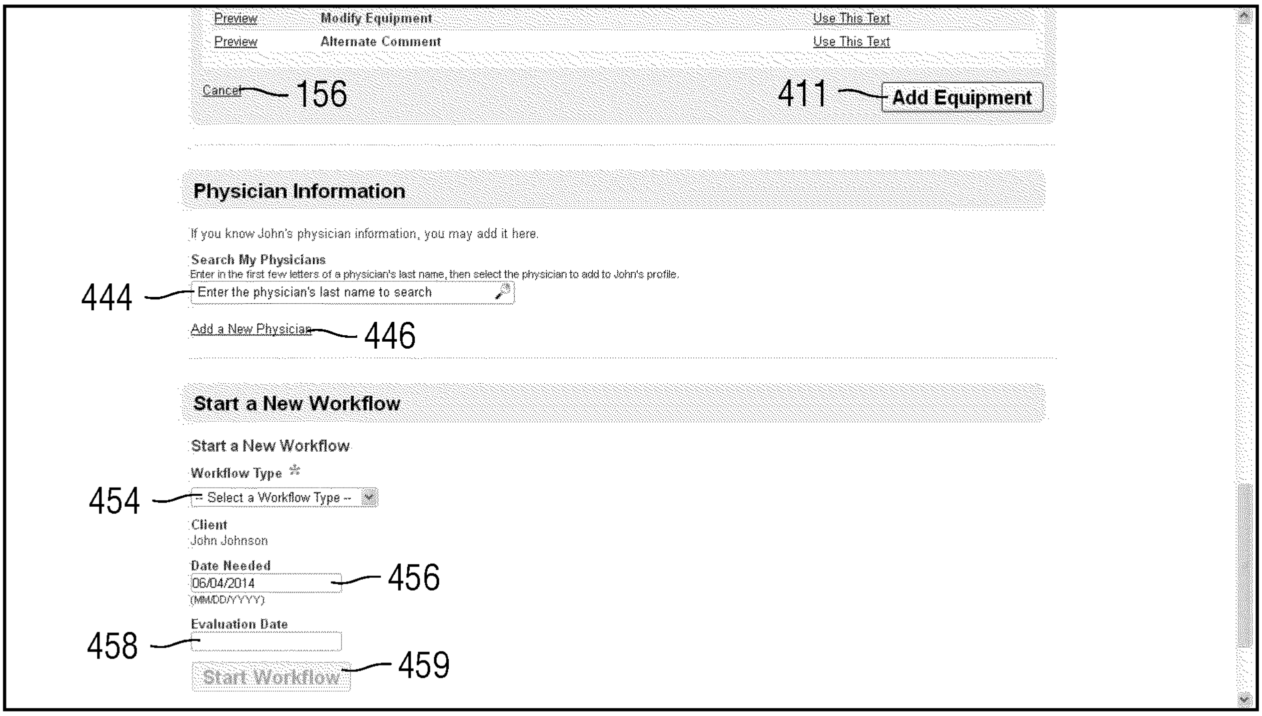
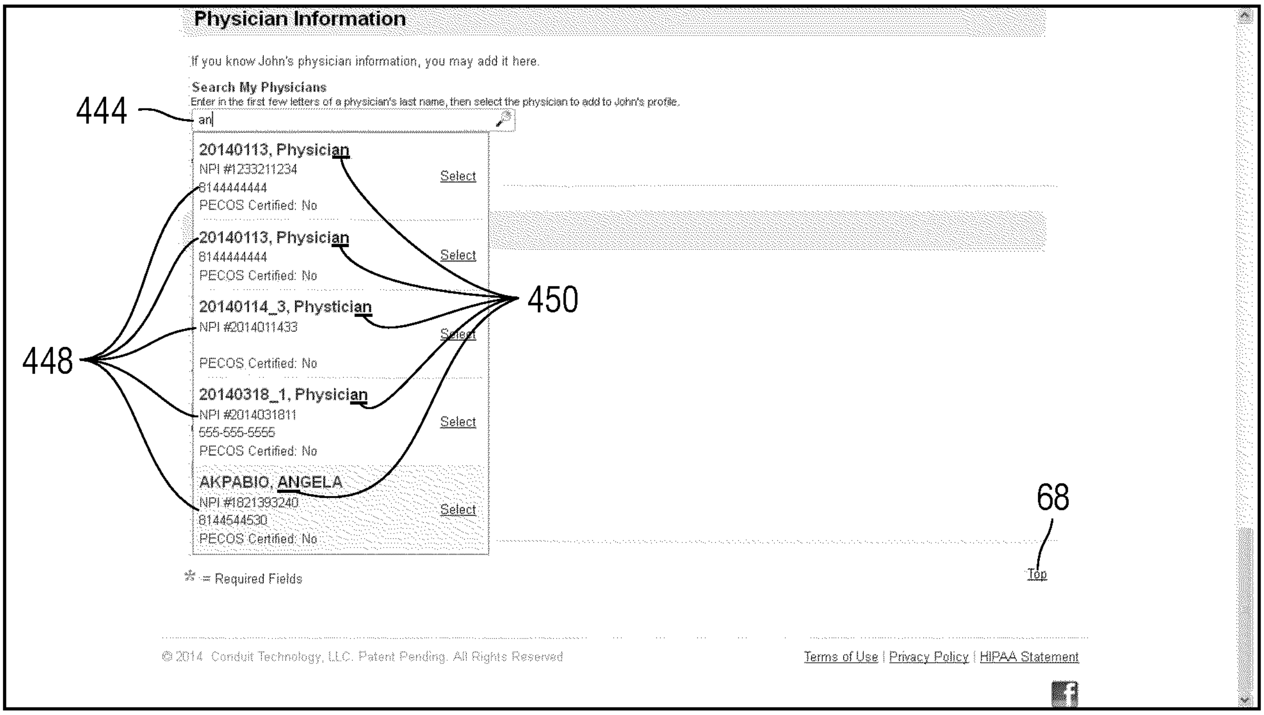

Preview
Modify Equipment
Use This Text
Preview
Alternate Comment
Use This Text
Cancel
156
411
Add Equipment
Physician Information
If you know John's physician information, you may add it here.
Search My Physicians
Enter in the first few letters of a physician's last name, then select the physician to add to John's profile.
444
Enter the physician's last name to search
Add a New Physician
446
Start a New Workflow
Start a New Workflow
Workflow Type
454
-- Select a Workflow Type --
Client
John Johnson
Date Needed
06/04/2014
(MM/DD/YYYY)
456
Evaluation Date
458
Start Workflow
459

Fig.43


Physician Information
If you know John's physician information, you may add it here.
Search My Physicians
Enter in the first few letters of a physician's last name, then select the physician to add to John's profile.
444
an
20140113, Physician
NPI #1233211234
8144444444
PECOS Certified: No
Select
20140113, Physician
8144444444
PECOS Certified: No
Select
20140114_3, Phystician
NPI #2014011433
PECOS Certified: No
Select
20140318_1, Physician
NPI #2014031811
555-555-5555
PECOS Certified: No
Select
AKPABIO, ANGELA
NPI #1821393240
8144544530
PECOS Certified: No
Select
448
450
68
Top
= Required Fields
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Terms of Use | Privacy Policy | HIPAA Statement

Fig.44

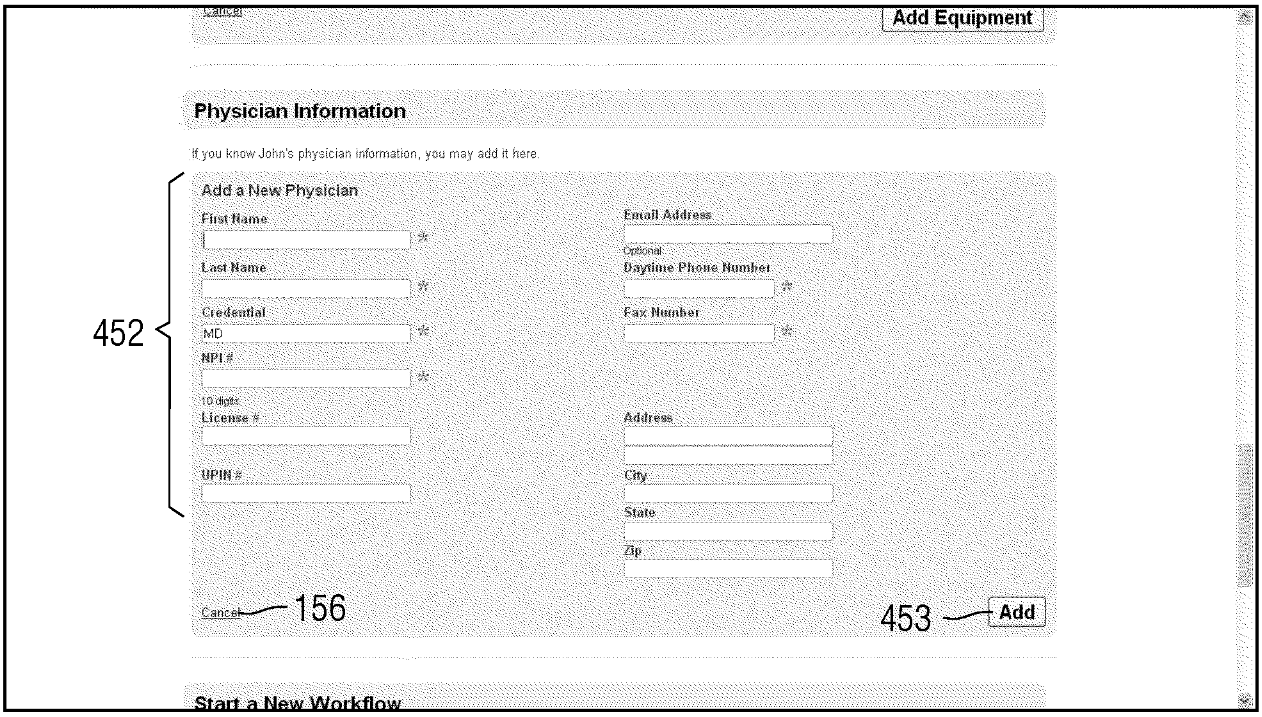

Cancel
Add Equipment
Physician Information
If you know John's physician information, you may add it here.
452
Add a New Physician
First Name
Last Name
Credential
MD
NPI #
10 digits
License #
UPIN #
Email Address
Optional
Daytime Phone Number
Fax Number
Address
City
State
Zip
Cancel
156
453
Add
Start a New Workflow

Fig.45

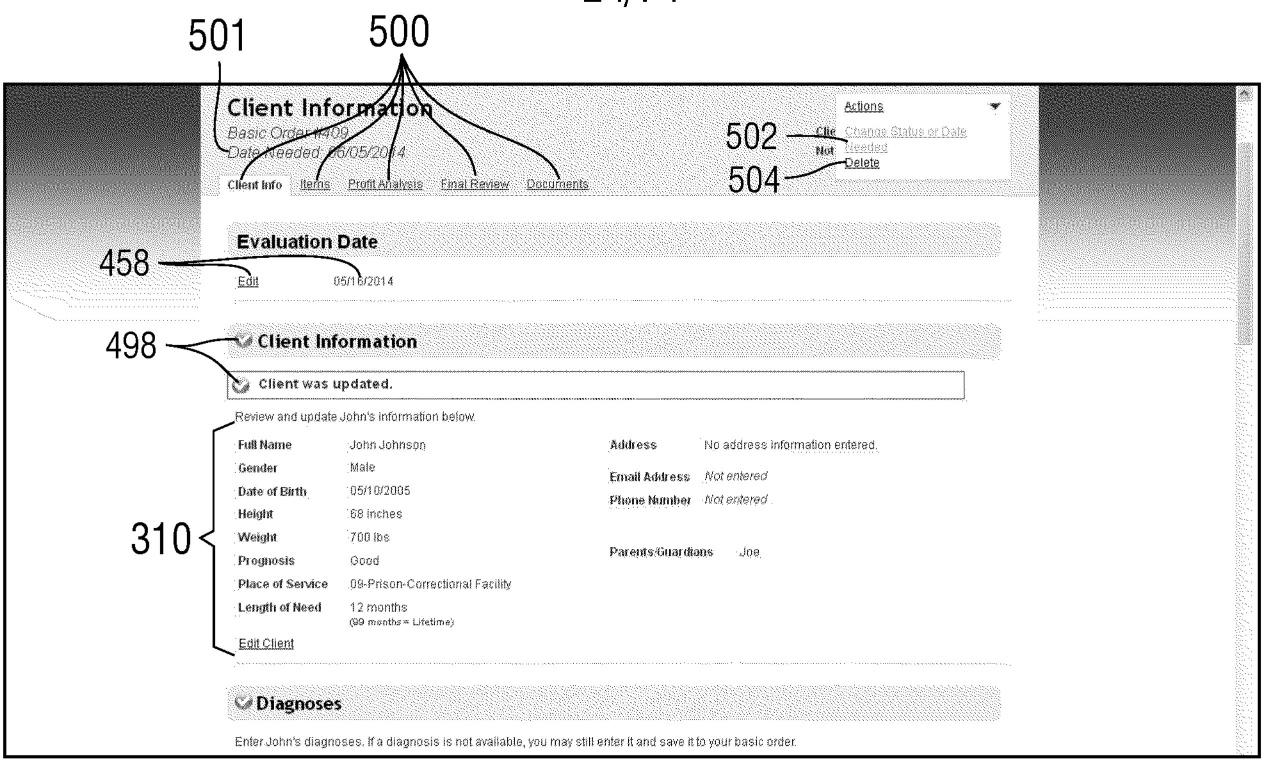

501
500
Client Information
Basic Order #409
Date Needed: 06/05/2014
Client Info
Items
Profit Analysis
Final Review
Documents
Actions
502
Change Status or Date Needed
504
Delete
Evaluation Date
458
Edit
05/16/2014
498
Client Information
Client was updated.
Review and update John's information below.
310
Full Name John Johnson
Gender Male
Date of Birth 05/10/2005
Height 68 inches
Weight 700 lbs
Prognosis Good
Place of Service 09-Prison-Correctional Facility
Length of Need 12 months
(99 months = Lifetime)
Edit Client
Address No address information entered.
Email Address Not entered
Phone Number Not entered
Parents/Guardians Joe
Diagnoses
Enter John's diagnoses. If a diagnosis is not available, you may still enter it and save it to your basic order.

Fig.46

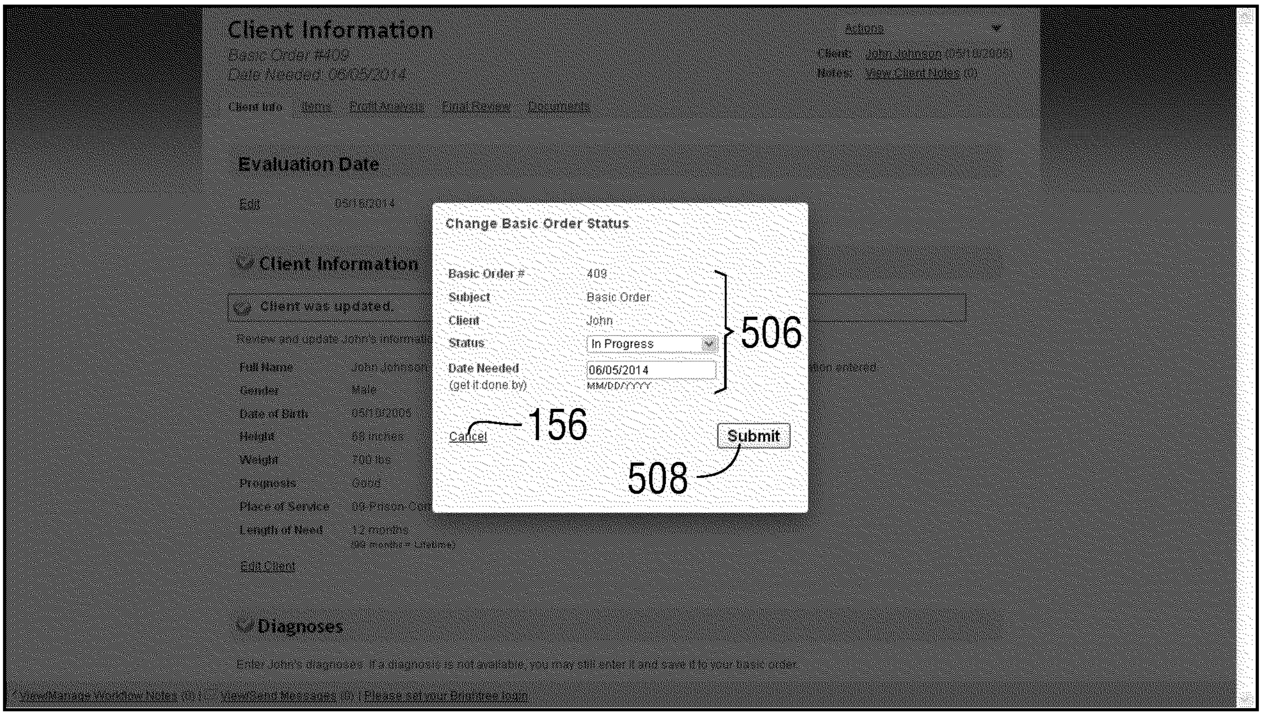
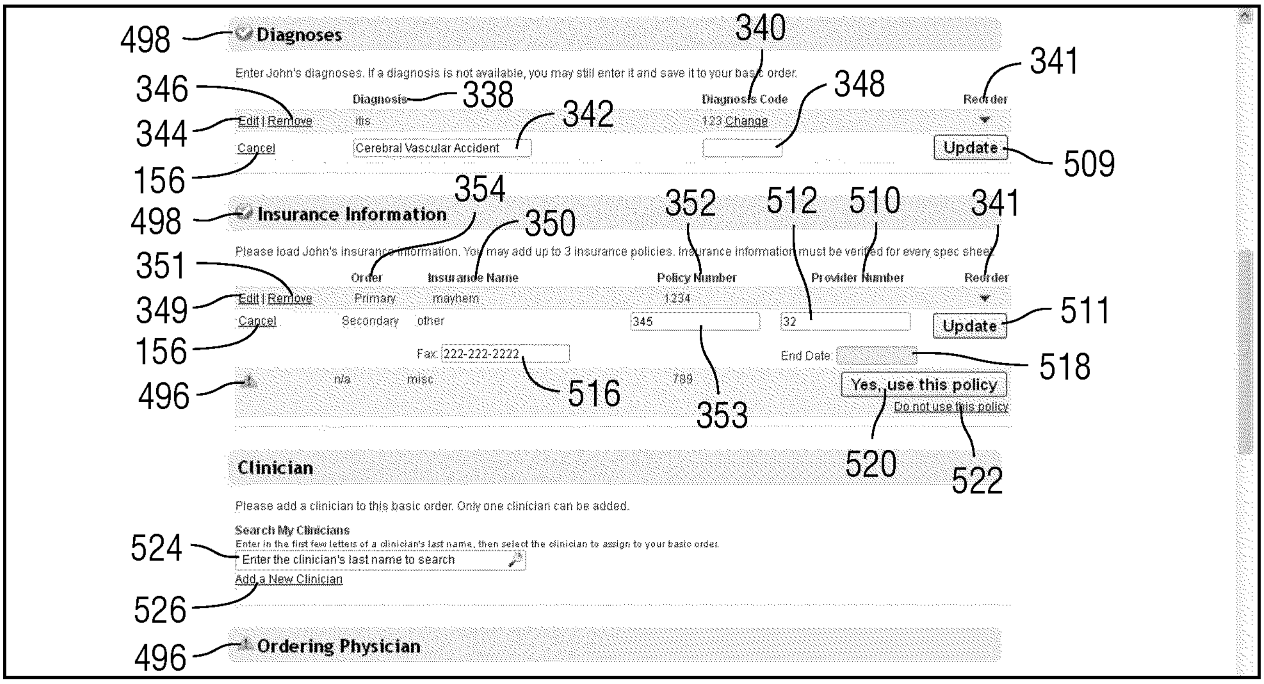
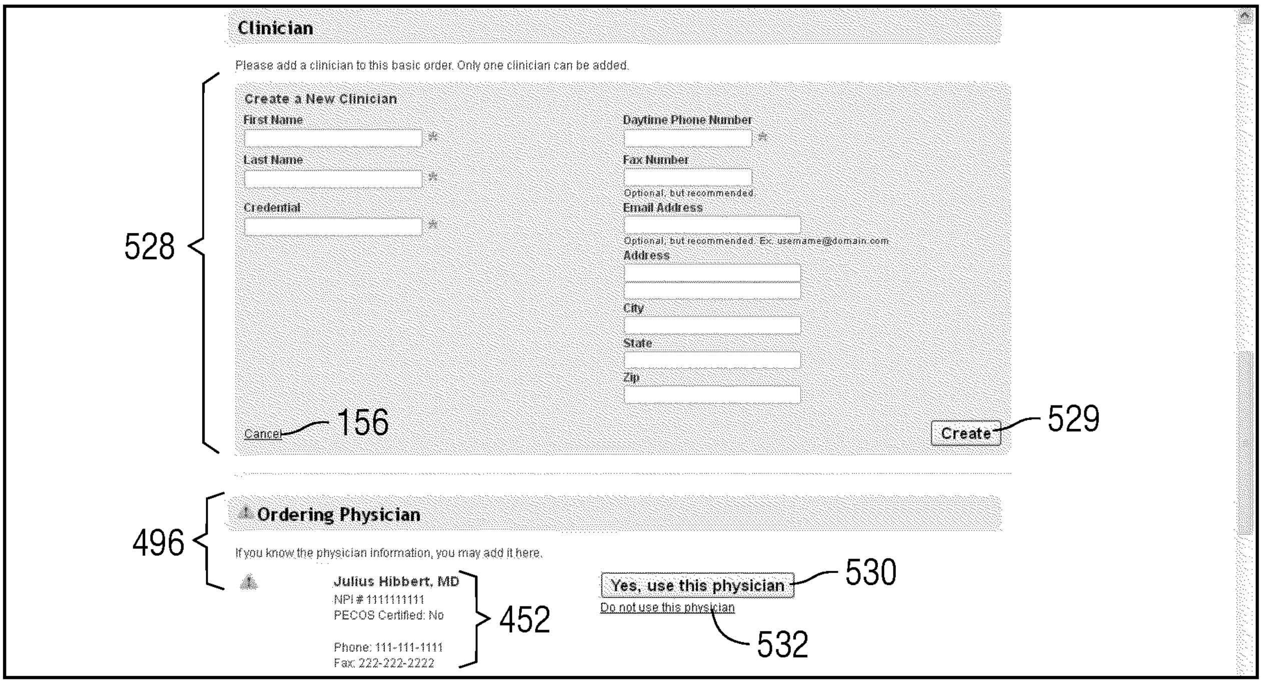

Change Basic Order Status
Basic Order # 409
Subject Basic Order
Client John
Status In Progress
Date Needed (get it done by) 06/05/2014
MM/DD/YYYY
506
Cancel
156
Submit
508

Fig.47



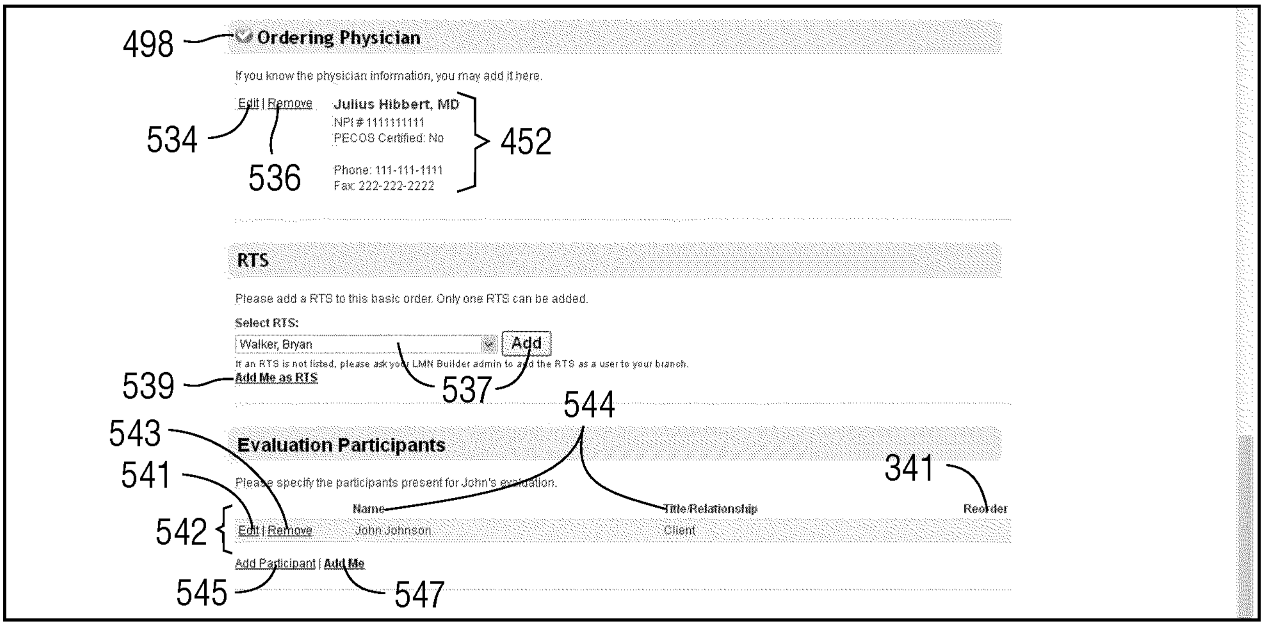
498
Diagnoses
340
Enter John's diagnoses. If a diagnosis is not available, you may still enter it and save it to your basic order.
341
346
Diagnosis
338
Diagnosis Code
348
Reorder
344
Edit | Remove
itis
342
123 Change
156
Cancel
Cerebral Vascular Accident
Update
509
498
Insurance Information
354
350
352
512
510
341
Please load John's insurance information. You may add up to 3 insurance policies. Insurance information must be verified for every spec sheet.
351
Order
Insurance Name
Policy Number
Provider Number
Reorder
349
Edit | Remove
Primary
mayhem
1234
511
156
Cancel
Secondary
other
345
32
Update
Fax: 222-222-2222
End Date:
518
496
n/a
misc
789
516
353
Yes, use this policy
Do not use this policy
Clinician
520
522
Please add a clinician to this basic order. Only one clinician can be added.
Search My Clinicians
524
Enter in the first few letters of a clinician's last name, then select the clinician to assign to your basic order.
Enter the clinician's last name to search
Add a New Clinician
526
496
Ordering Physician

Fig.48



Clinician
Please add a clinician to this basic order. Only one clinician can be added.
Create a New Clinician
First Name
Daytime Phone Number
Last Name
Fax Number
Optional, but recommended.
Credential
Email Address
528
Optional, but recommended. Ex. username@domain.com
Address
City
State
Zip
Cancel
156
Create
529
496
Ordering Physician
If you know the physician information, you may add it here.
Julius Hibbert, MD
NPI # 1111111111
PECOS Certified: No
Phone: 111-111-1111
Fax: 222-222-2222
452
Yes, use this physician
530
Do not use this physician
532

Fig.49



498
Ordering Physician
If you know the physician information, you may add it here.
Edit | Remove
Julius Hibbert, MD
NPI # 1111111111
PECOS Certified: No
Phone: 111-111-1111
Fax: 222-222-2222
534
536
452
RTS
Please add a RTS to this basic order. Only one RTS can be added.
Select RTS:
Walker, Bryan
Add
If an RTS is not listed, please ask your LMN Builder admin to add the RTS as a user to your branch.
539
Add Me as RTS
537
544
543
Evaluation Participants
541
341
Please specify the participants present for John's evaluation.
Name
Title/Relationship
Reorder
542
Edit | Remove
John Johnson
Client
Add Participant | Add Me
545
547

Fig.50

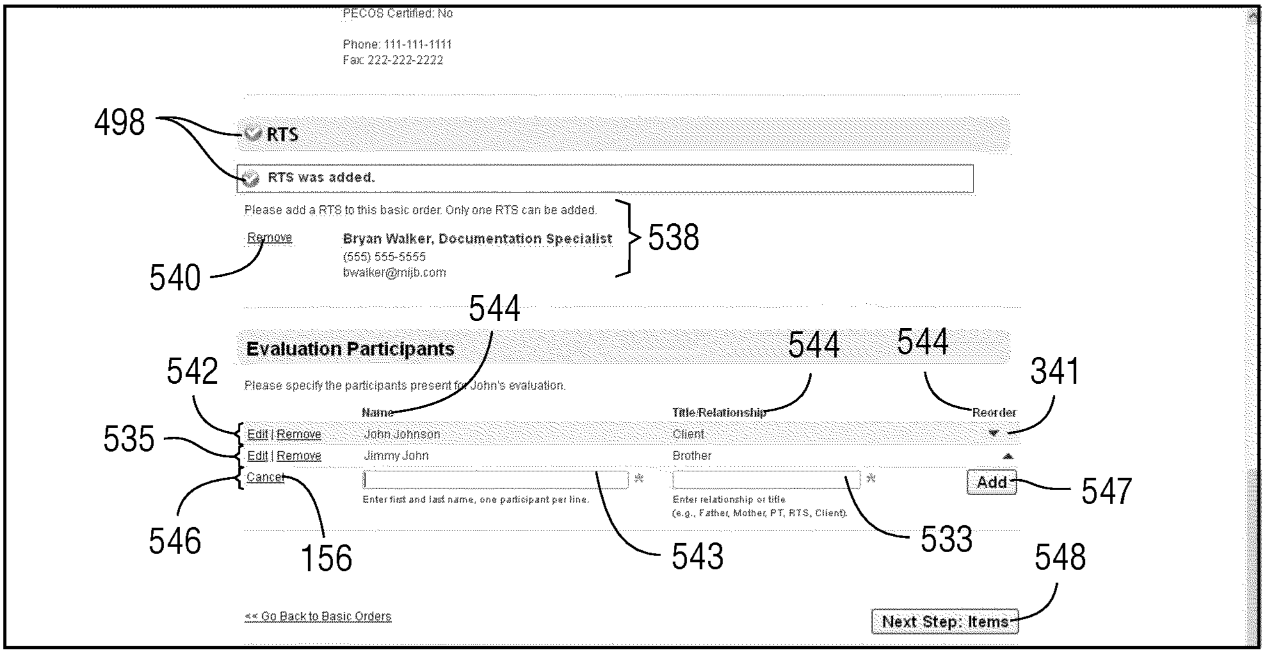

PECOS Certified: No
Phone: 111-111-1111
Fax: 222-222-2222
498
RTS
RTS was added.
Please add a RTS to this basic order. Only one RTS can be added.
Remove
Bryan Walker, Documentation Specialist
(555) 555-5555
bwalker@mijb.com
538
540
544
Evaluation Participants
544
544
542
Please specify the participants present for John's evaluation.
341
Name
Title/Relationship
Reorder
535
Edit | Remove
John Johnson
Client
Edit | Remove
Jimmy John
Brother
Cancel
Add
547
Enter first and last name, one participant per line.
Enter relationship or title
(e.g., Father, Mother, PT, RTS, Client).
546
156
543
533
548
<< Go Back to Basic Orders
Next Step: Items

Fig.51

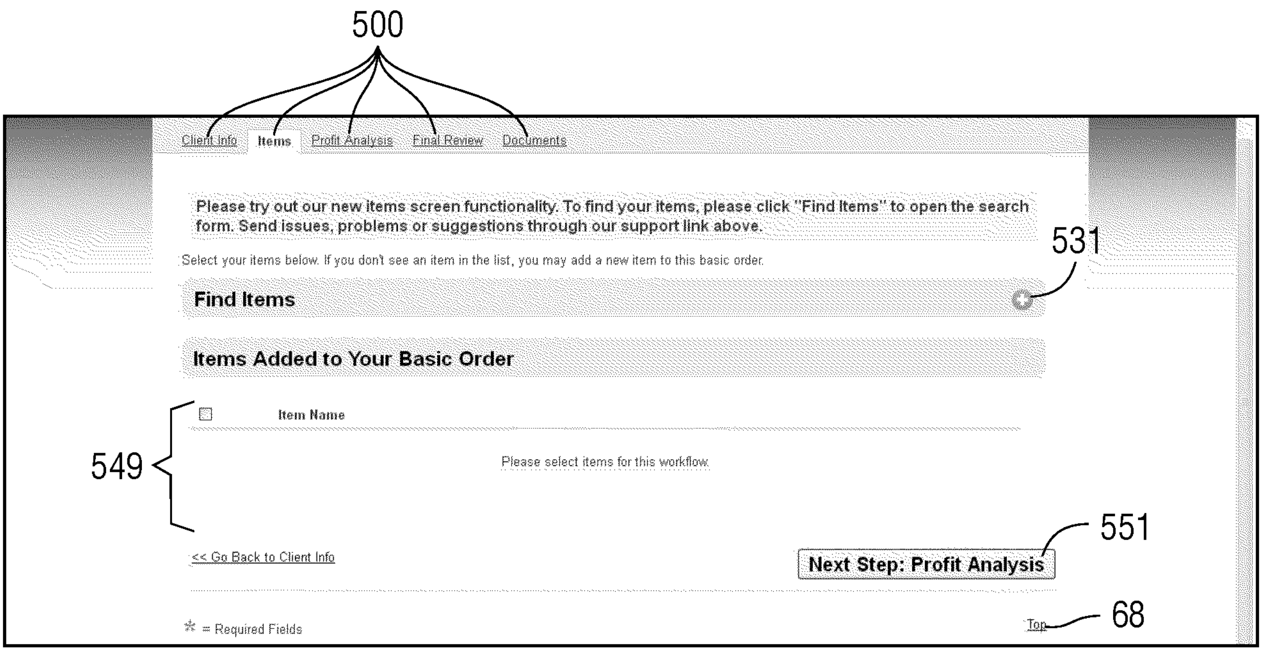

500
Client Info
Items
Profit Analysis
Final Review
Documents
Please try out our new items screen functionality. To find your items, please click "Find Items" to open the search form. Send issues, problems or suggestions through our support link above.
531
Select your items below. If you don't see an item in the list, you may add a new item to this basic order.
Find Items
Items Added to Your Basic Order
Item Name
549
Please select items for this workflow.
551
<< Go Back to Client Info
Next Step: Profit Analysis
* = Required Fields
Top
68

Fig.52

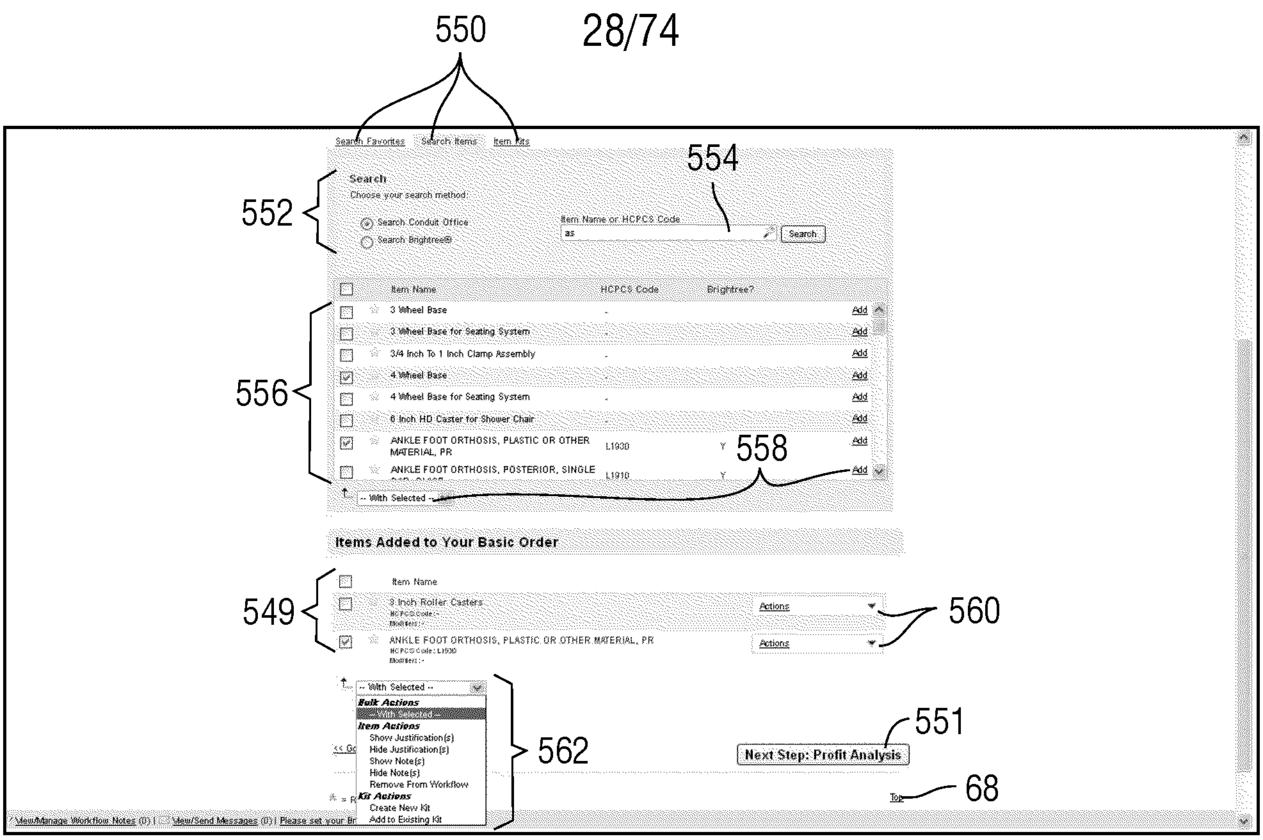

550
554
552
556
558
549
560
562
551
68
Search Favorites
Search Items
Item Kits
Search
Choose your search method:
Search Conduit Office
Search Brightree®
Item Name or HCPCS Code
Search
Item Name
HCPCS Code
Brightree?
3 Wheel Base
3 Wheel Base for Seating System
3/4 Inch To 1 Inch Clamp Assembly
4 Wheel Base
4 Wheel Base for Seating System
6 Inch HD Caster for Shower Chair
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
ANKLE FOOT ORTHOSIS, POSTERIOR, SINGLE
L1930
L1910
Add
-- With Selected --
Items Added to Your Basic Order
3 Inch Roller Casters
Actions
Bulk Actions
Item Actions
Show Justification(s)
Hide Justification(s)
Show Note(s)
Hide Note(s)
Remove From Workflow
Kit Actions
Create New Kit
Add to Existing Kit
Next Step: Profit Analysis
Top

Fig.53

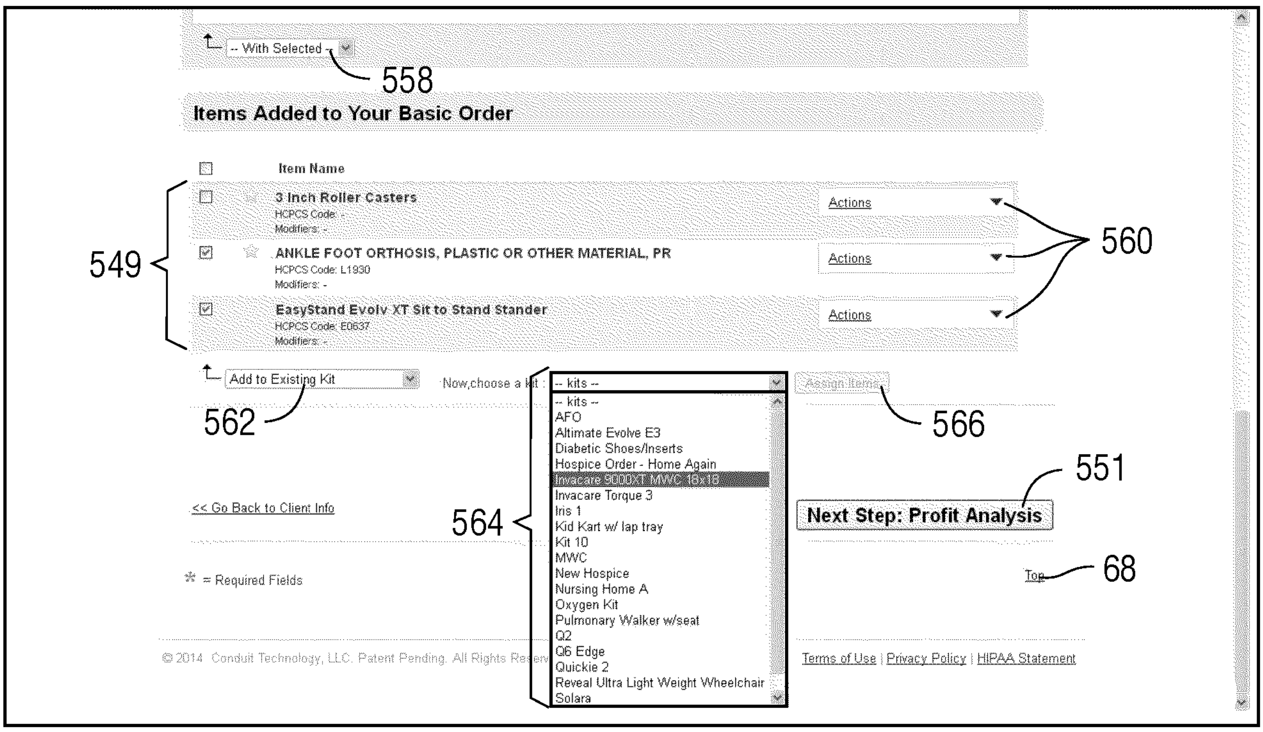

558
560
549
562
566
551
564
68
-- With Selected --
Items Added to Your Basic Order
Item Name
3 Inch Roller Casters
HCPCS Code: -
Modifiers: -
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
HCPCS Code: L1930
EasyStand Evolv XT Sit to Stand Stander
HCPCS Code: E0637
Actions
Add to Existing Kit
Now,choose a kit :
-- kits --
AFO
Altimate Evolve E3
Diabetic Shoes/Inserts
Hospice Order - Home Again
Invacare 9000XT MWC 18x18
Invacare Torque 3
Iris 1
Kid Kart w/ lap tray
Kit 10
MWC
New Hospice
Nursing Home A
Oxygen Kit
Pulmonary Walker w/seat
Q2
Q6 Edge
Quickie 2
Reveal Ultra Light Weight Wheelchair
Solara
Assign Items
<< Go Back to Client Info
Next Step: Profit Analysis
= Required Fields
Top
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Fig.54

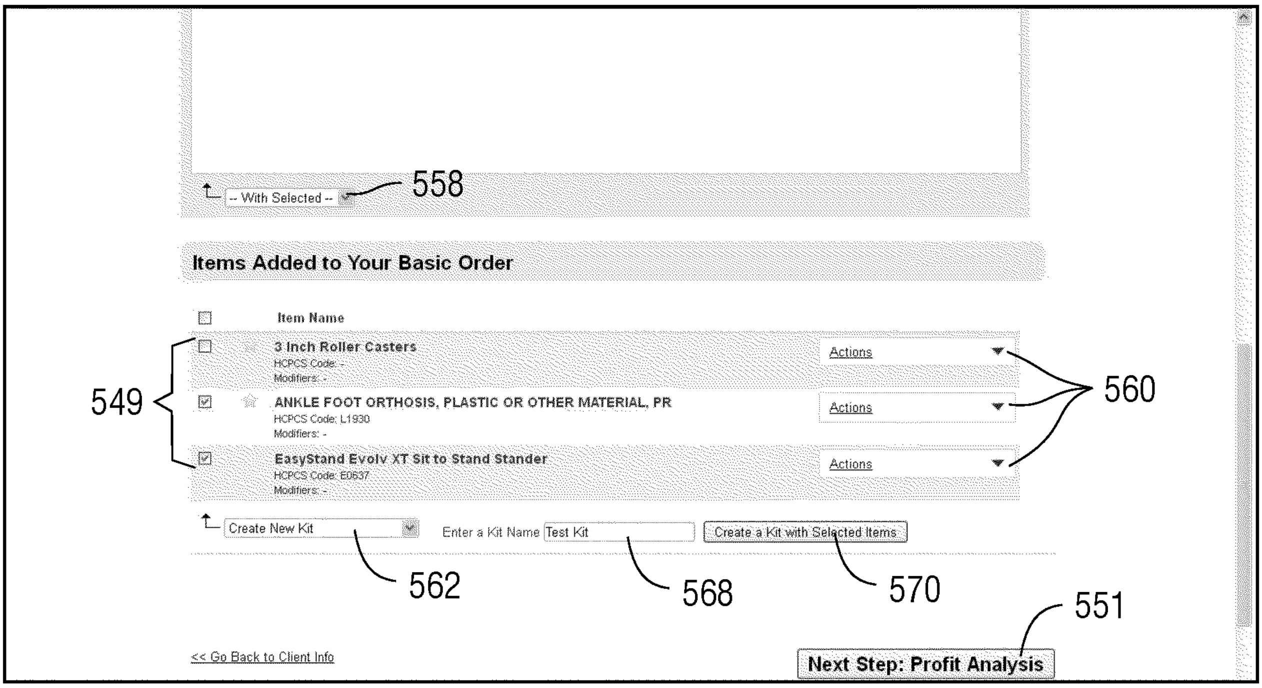
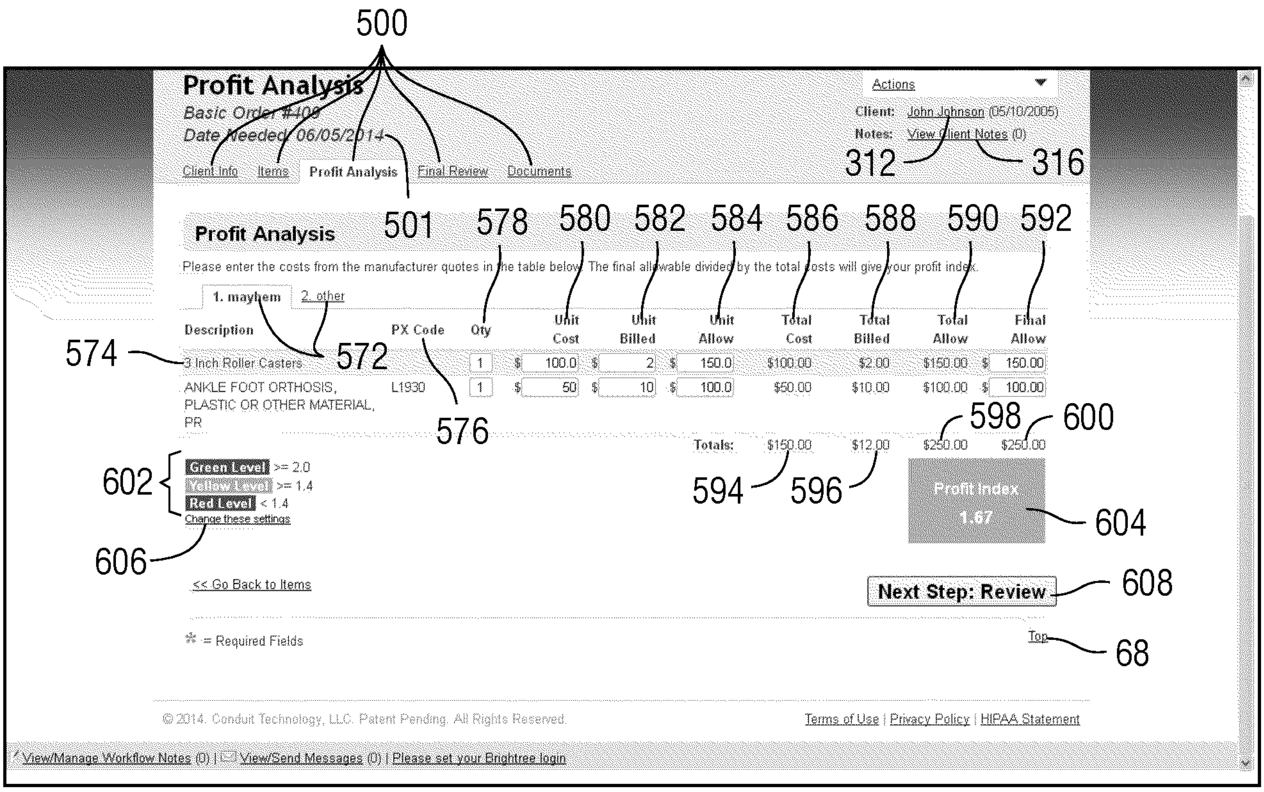

-- With Selected --
558
Items Added to Your Basic Order
Item Name
3 Inch Roller Casters
HCPCS Code: -
Modifiers: -
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
HCPCS Code: L1930
Modifiers: -
EasyStand Evolv XT Sit to Stand Stander
HCPCS Code: E0637
Modifiers: -
Actions
Actions
Actions
549
560
Create New Kit
Enter a Kit Name Test Kit
Create a Kit with Selected Items
562
568
570
551
<< Go Back to Client Info
Next Step: Profit Analysis

Fig.55


500
Profit Analysis
Basic Order #408
Date Needed: 06/05/2014
Actions
Client: John Johnson (05/10/2005)
Notes: View Client Notes (0)
312
316
Client Info
Items
Profit Analysis
Final Review
Documents
Profit Analysis
501
578
580
582
584
586
588
590
592
Please enter the costs from the manufacturer quotes in the table below. The final allowable divided by the total costs will give your profit index.
1. mayhem
2. other
Description
PX Code
Qty
Unit Cost
Unit Billed
Unit Allow
Total Cost
Total Billed
Total Allow
Final Allow
574
572
3 Inch Roller Casters
1
$ 100.0
$ 2
$ 150.0
$100.00
$2.00
$150.00
$ 150.00
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
L1930
1
$ 50
$ 10
$ 100.0
$50.00
$10.00
$100.00
$ 100.00
576
598
600
Totals:
$150.00
$12.00
$250.00
$250.00
602
Green Level >= 2.0
Yellow Level >= 1.4
Red Level < 1.4
Change these settings
594
596
Profit Index
1.67
604
606
<< Go Back to Items
Next Step: Review
608
* = Required Fields
Top
68
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Terms of Use | Privacy Policy | HIPAA Statement
View/Manage Workflow Notes (0) | View/Send Messages (0) | Please set your Brightree login

Fig.56

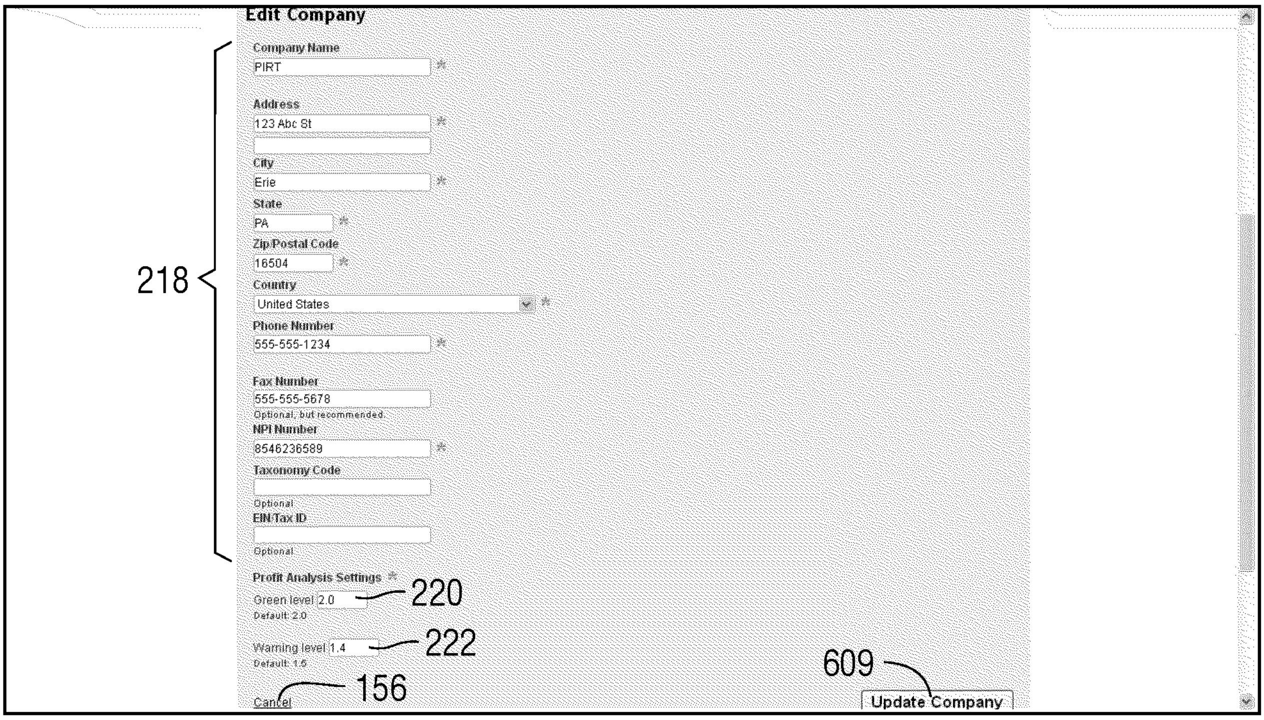

Edit Company
Company Name
PIRT
Address
123 Abc St
City
Erie
State
PA
Zip/Postal Code
16504
Country
United States
Phone Number
555-555-1234
Fax Number
555-555-5678
Optional, but recommended.
NPI Number
8546236589
Taxonomy Code
Optional
EIN/Tax ID
Optional
Profit Analysis Settings
Green level 2.0
Default: 2.0
Warning level 1.4
Default: 1.5
Cancel
Update Company
218
220
222
156
609

Fig.57

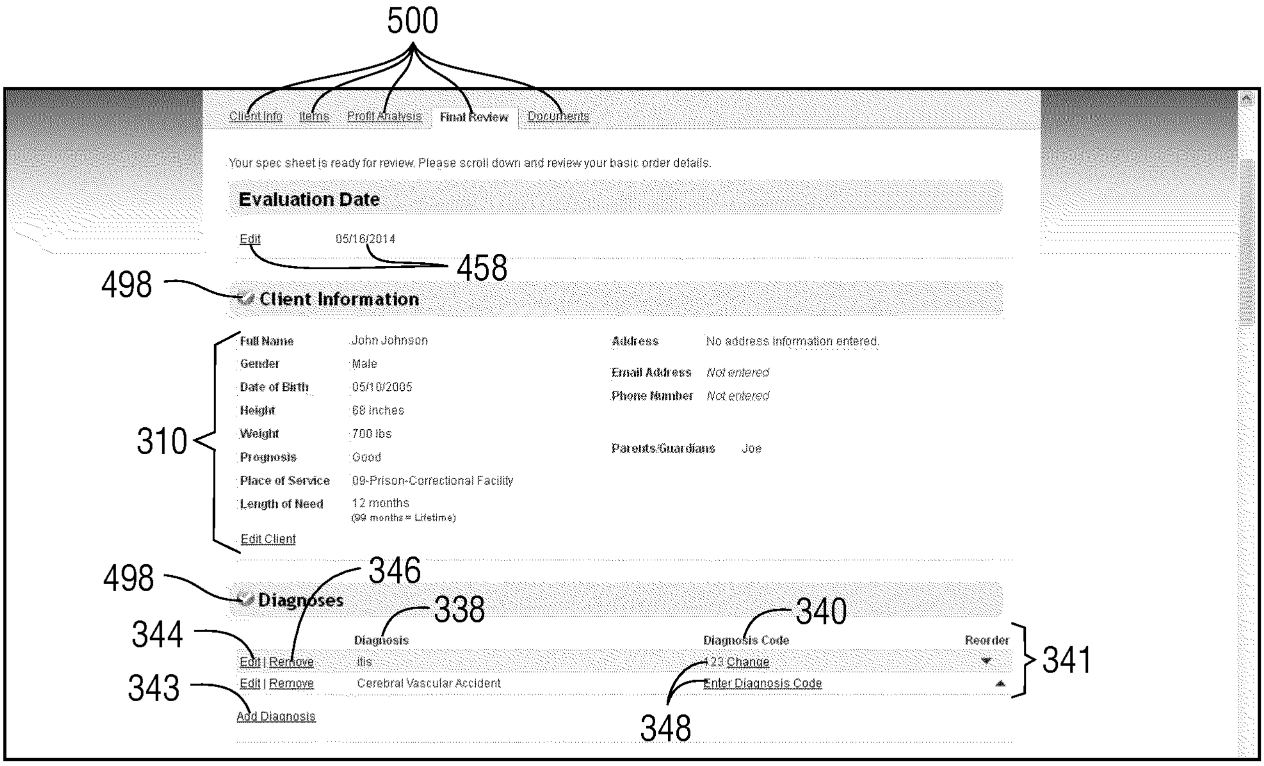
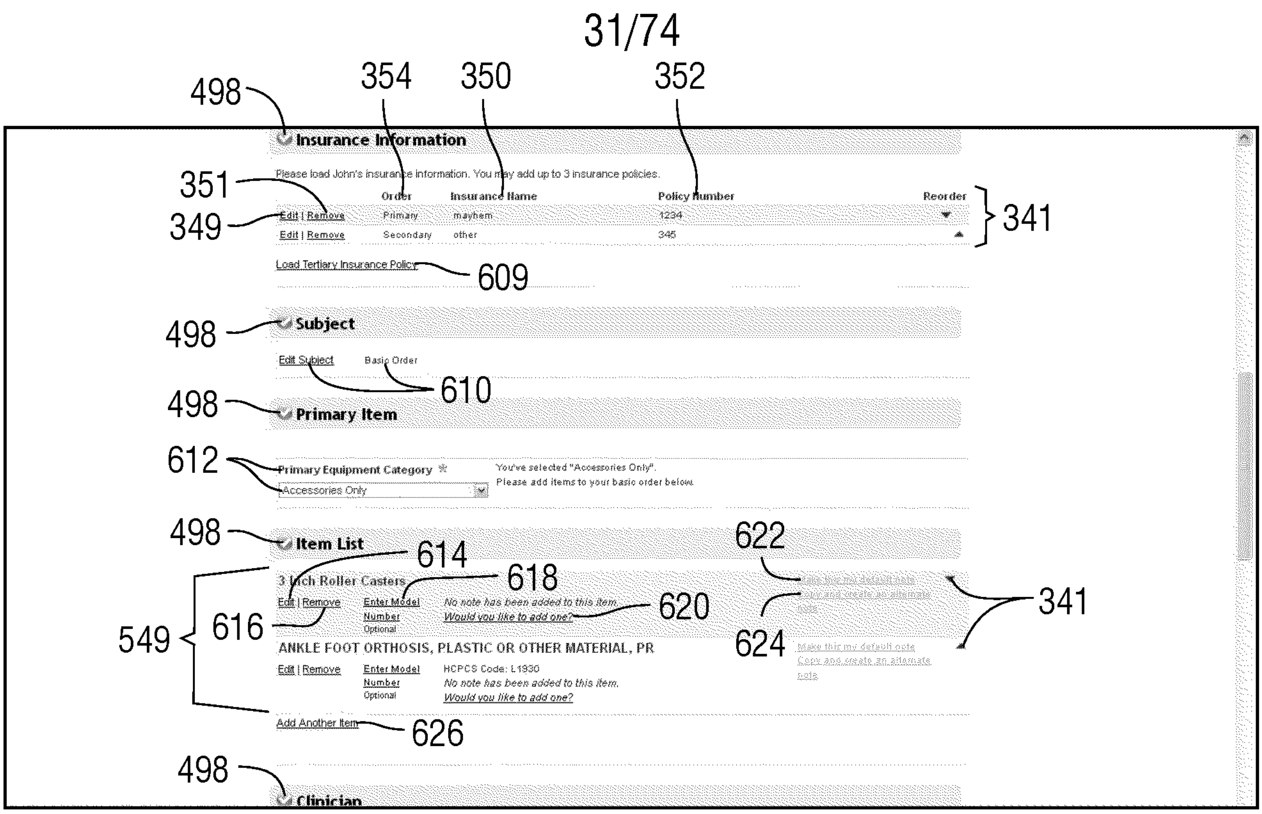
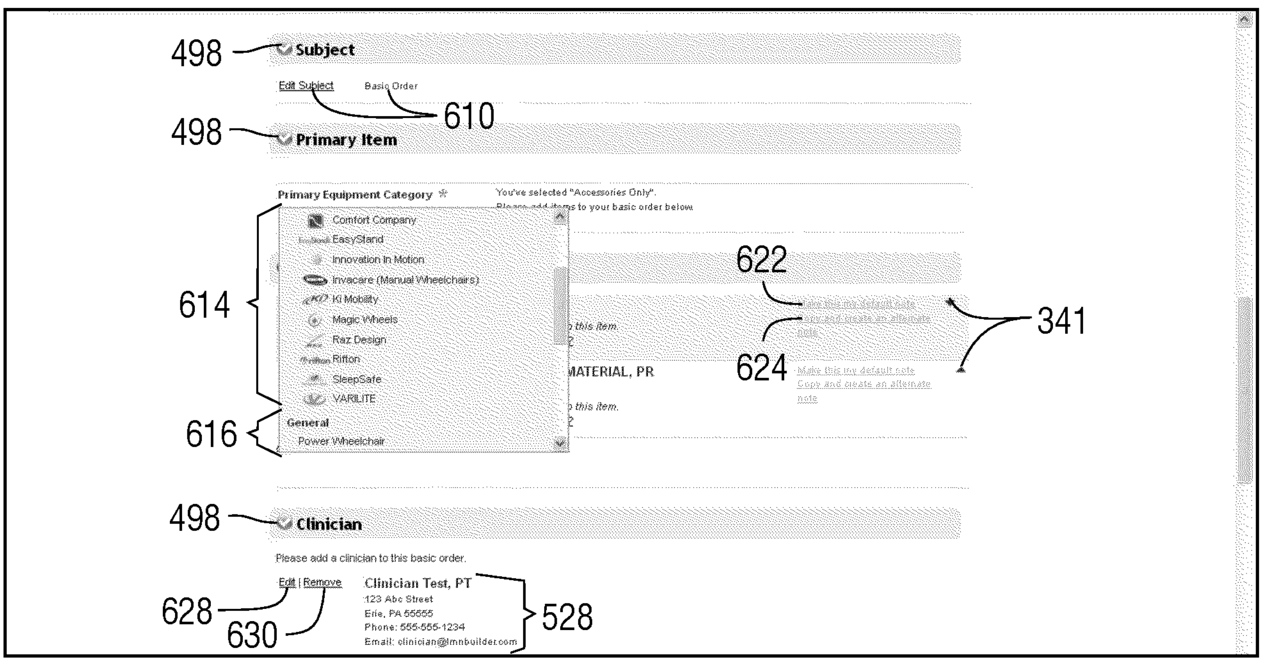

500
Client Info
Items
Profit Analysis
Final Review
Documents
Your spec sheet is ready for review. Please scroll down and review your basic order details.
Evaluation Date
Edit
05/16/2014
458
498
Client Information
Full Name
John Johnson
Gender
Male
Date of Birth
05/10/2005
Height
68 inches
Weight
700 lbs
Prognosis
Good
Place of Service
09-Prison-Correctional Facility
Length of Need
12 months
(99 months = Lifetime)
Edit Client
Address
No address information entered.
Email Address
Not entered
Phone Number
Not entered
Parents/Guardians
Joe
310
498
Diagnoses
346
338
340
344
Diagnosis
Diagnosis Code
Reorder
341
Edit | Remove
itis
123 Change
Edit | Remove
Cerebral Vascular Accident
Enter Diagnosis Code
343
Add Diagnosis
348

Fig.58



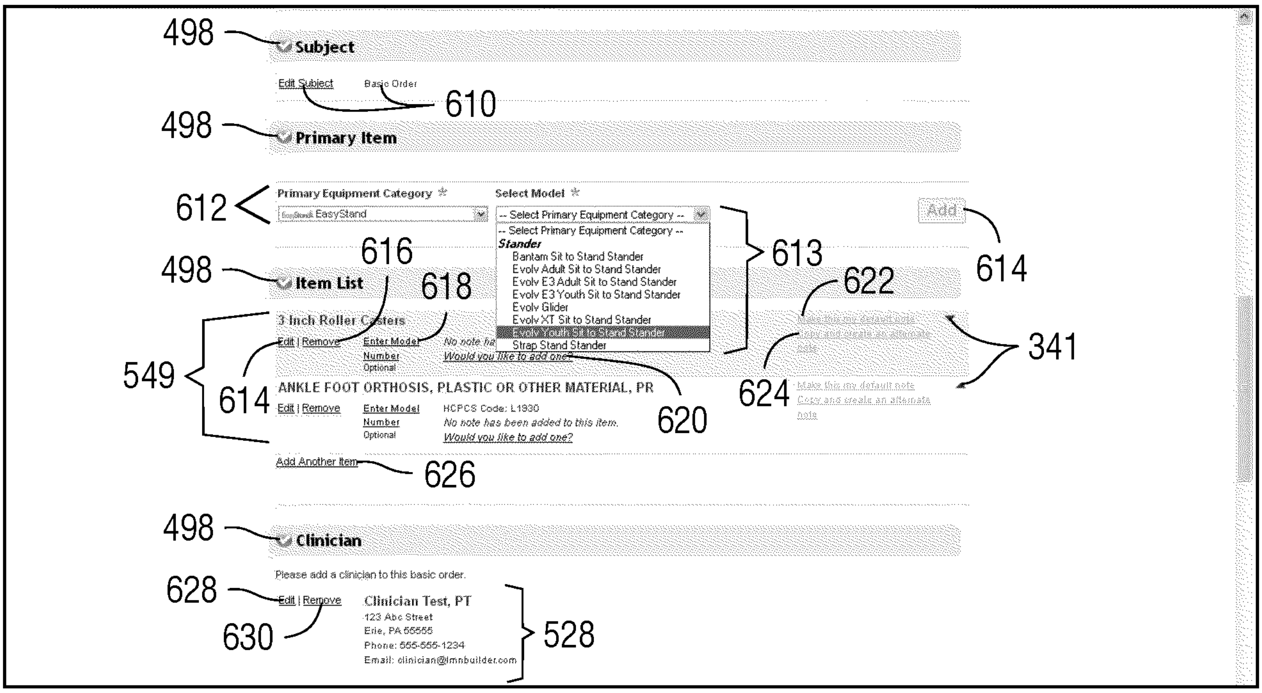
498
354
350
352
Insurance Information
351
Please load John's insurance information. You may add up to 3 insurance policies.
Order
Insurance Name
Policy Number
Reorder
349
Edit | Remove
Primary
mayhem
1234
Edit | Remove
Secondary
other
345
341
Load Tertiary Insurance Policy
609
498
Subject
Edit Subject
Basic Order
610
498
Primary Item
612
Primary Equipment Category
You've selected "Accessories Only".
Please add items to your basic order below.
Accessories Only
498
Item List
614
622
618
3 Inch Roller Casters
Edit | Remove
Enter Model Number
Optional
No note has been added to this item.
Would you like to add one?
620
341
549
616
624
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
Edit | Remove
Enter Model Number
Optional
HCPCS Code: L1930
No note has been added to this item.
Would you like to add one?
Make this my default note
Copy and create an alternate note
Add Another Item
626
498
Clinician

Fig.59



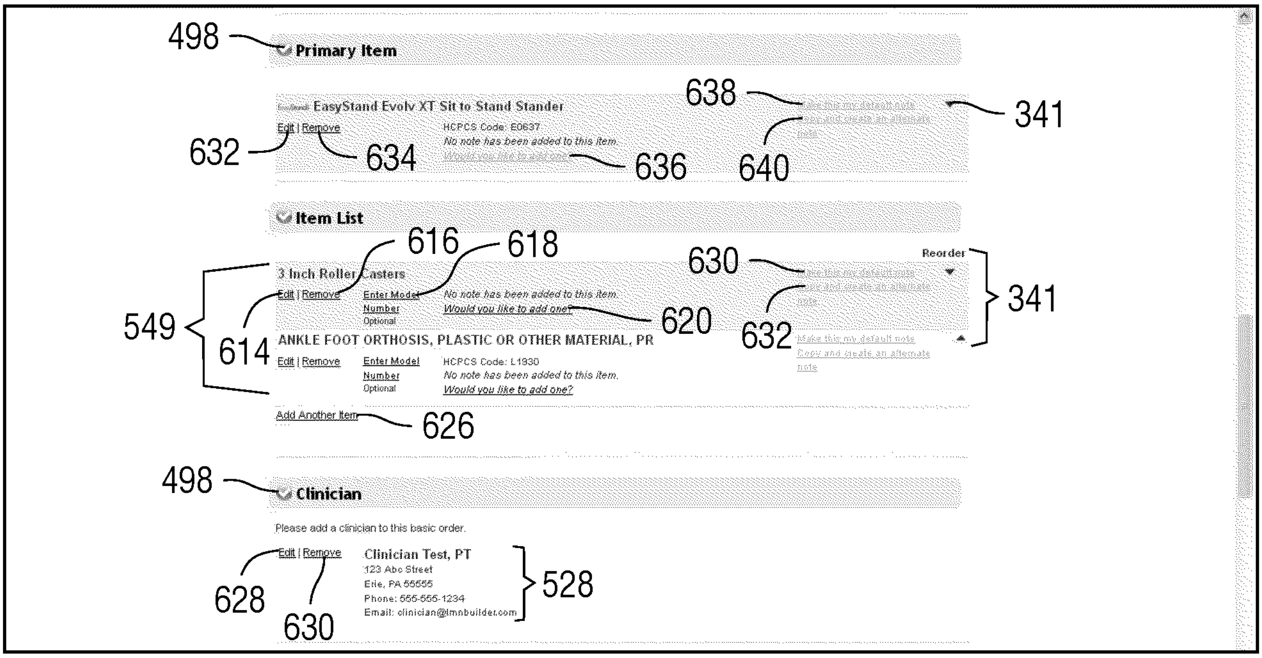
498
Subject
Edit Subject
Basic Order
610
498
Primary Item
Primary Equipment Category
You've selected "Accessories Only".
to your basic order below.
Comfort Company
EasyStand
Innovation In Motion
Invacare (Manual Wheelchairs)
Ki Mobility
Magic Wheels
Raz Design
Rifton
SleepSafe
VARILITE
General
Power Wheelchair
614
622
624
341
616
MATERIAL, PR
Make this my default note
Copy and create an alternate note
498
Clinician
Please add a clinician to this basic order.
628
Edit | Remove
630
Clinician Test, PT
123 Abc Street
Erie, PA 55555
Phone: 555-555-1234
Email: clinician@lmnbuilder.com
528

Fig.60



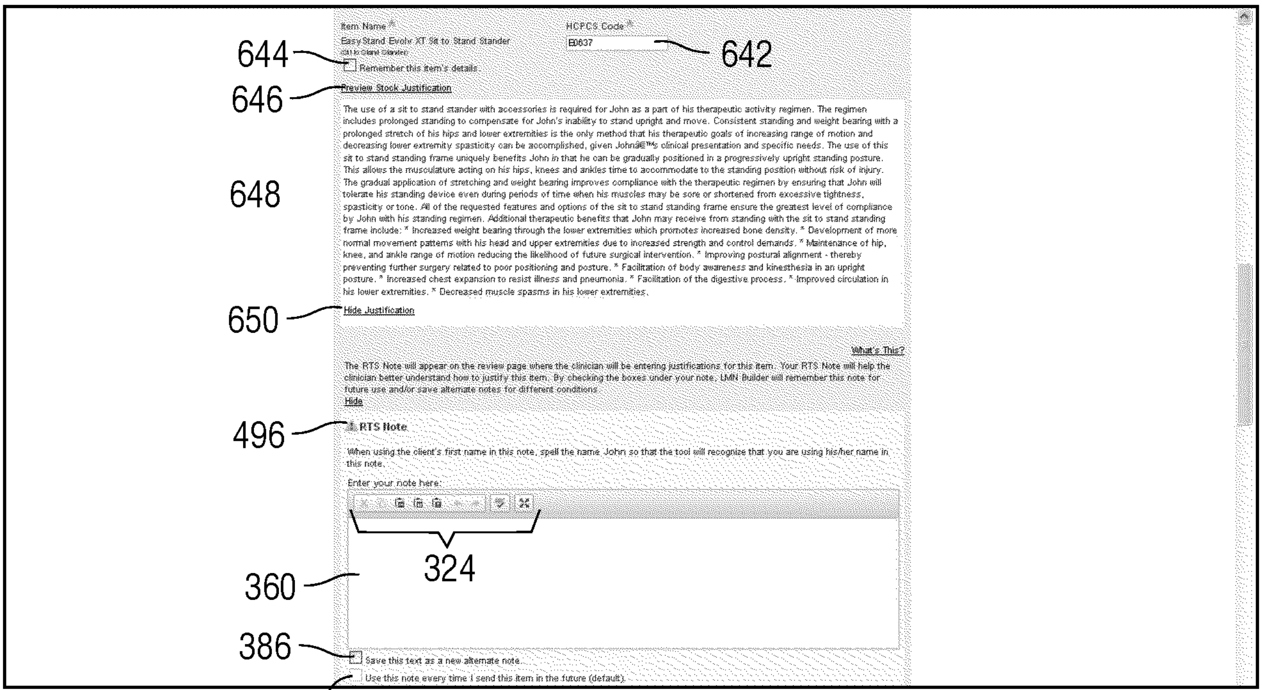
498
Subject
Edit Subject
Basic Order
610
498
Primary Item
612
Primary Equipment Category
EasyStand
Select Model
-- Select Primary Equipment Category --
Stander
Bantam Sit to Stand Stander
Evolv Adult Sit to Stand Stander
Evolv E3 Adult Sit to Stand Stander
Evolv E3 Youth Sit to Stand Stander
Evolv Glider
Evolv XT Sit to Stand Stander
Evolv Youth Sit to Stand Stander
Strap Stand Stander
Add
613
614
498
Item List
616
618
622
341
549
3 Inch Roller Casters
Edit | Remove
Enter Model Number Optional
Would you like to add one?
614
624
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
HCPCS Code: L1930
No note has been added to this item.
Would you like to add one?
620
Make this my default note
Copy and create an alternate note
Add Another Item
626
498
Clinician
Please add a clinician to this basic order.
628
630
Clinician Test, PT
123 Abc Street
Erie, PA 55555
Phone: 555-555-1234
Email: clinician@lmnbuilder.com
528

Fig.61



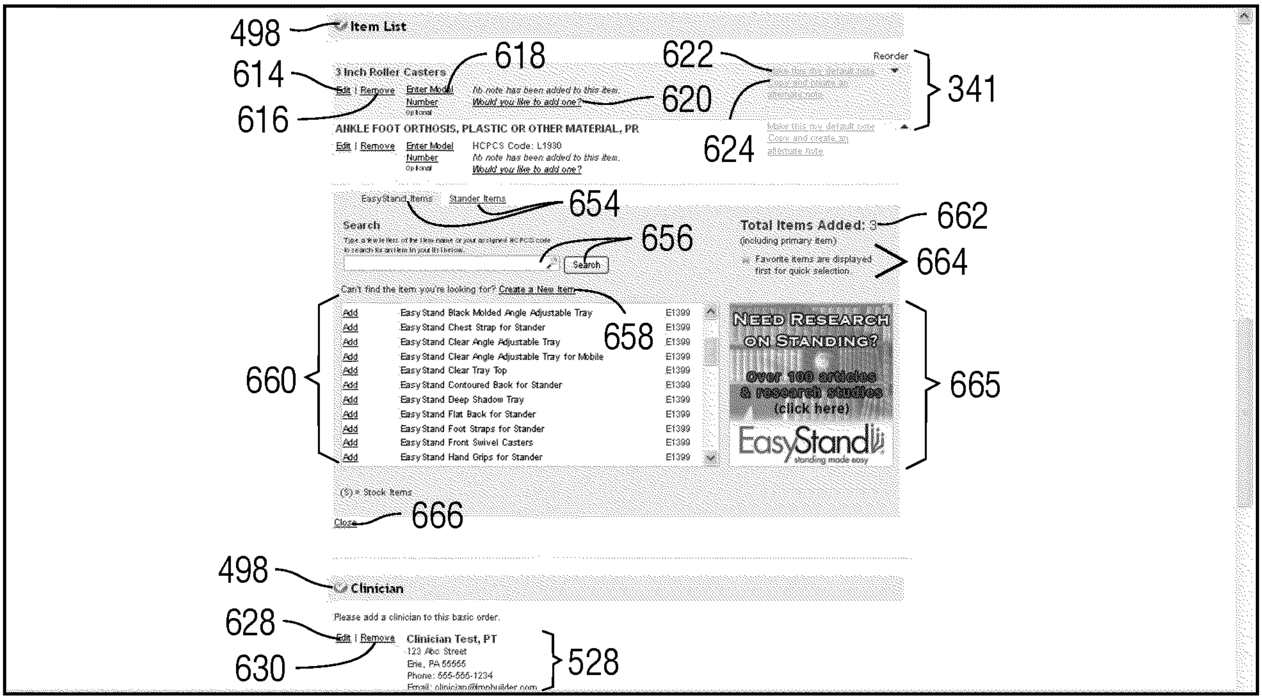
498
Primary Item
EasyStand Evolv XT Sit to Stand Stander
638
341
Edit | Remove
HCPCS Code: E0637
No note has been added to this item.
632
634
636
640
Item List
616
618
630
Reorder
341
549
3 Inch Roller Casters
Edit | Remove
Enter Model Number Optional
No note has been added to this item.
Would you like to add one?
620
614
632
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
HCPCS Code: L1930
No note has been added to this item.
Would you like to add one?
Make this my default note
Copy and create an alternate note
Add Another Item
626
498
Clinician
Please add a clinician to this basic order.
Edit | Remove
628
630
Clinician Test, PT
123 Abc Street
Erie, PA 55555
Phone: 555-555-1234
Email: clinician@lmnbuilder.com
528

Fig.62



644
646
648
650
496
360
386
652
642
324
Item Name
HCPCS Code
Remember this item's details
Preview Stock Justification
Hide Justification
What's This?
RTS Note
Enter your note here:
Save this text as a new alternate note.
Use this note every time I send this item in the future (default).

Fig.63



498
614
616
618
622
620
624
341
654
656
662
664
660
658
665
666
628
630
528
Item List
3 Inch Roller Casters
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
Search
Total Items Added: 3
Clinician
Clinician Test, PT
NEED RESEARCH ON STANDING?
Over 100 articles & research studies (click here)
EasyStand

Fig.64

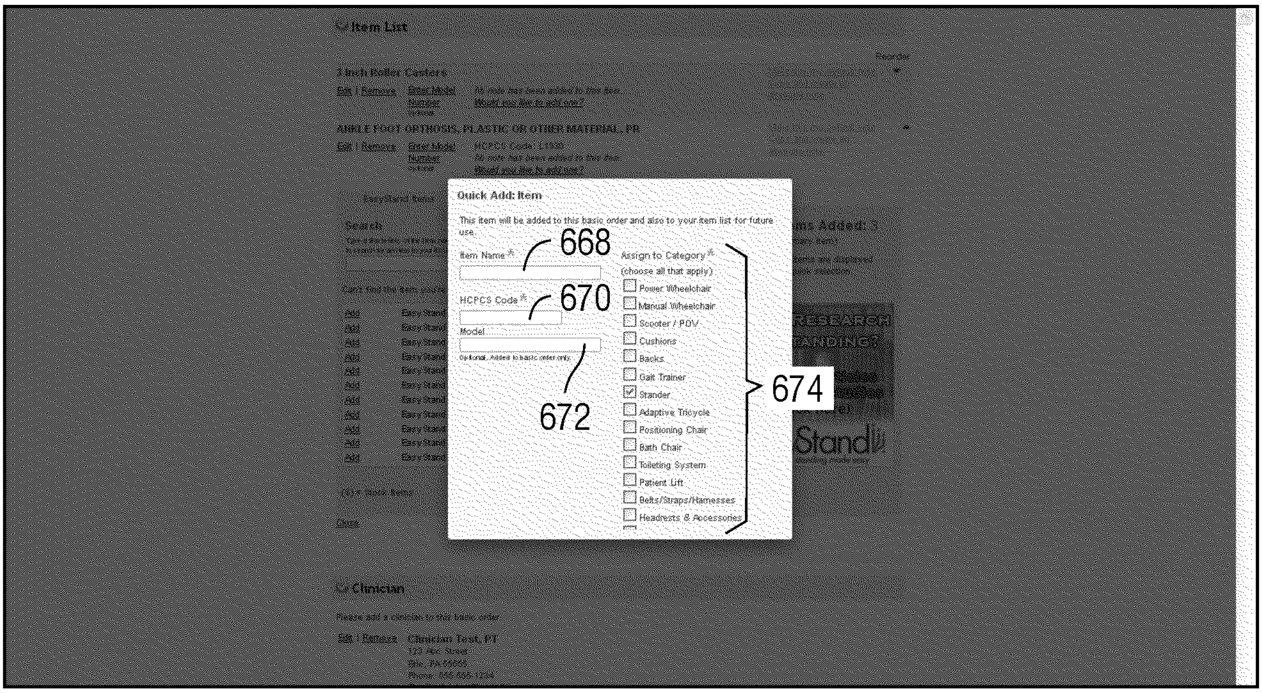

Item List
3 Inch Roller Casters
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
Quick Add: Item
This item will be added to this basic order and also to your item list for future use.
Item Name
HCPCS Code
Model
Assign to Category
(choose all that apply)
Power Wheelchair
Manual Wheelchair
Scooter / POV
Cushions
Backs
Gait Trainer
Stander
Adaptive Tricycle
Positioning Chair
Bath Chair
Toileting System
Patient Lift
Belts/Straps/Harnesses
Headrests & Accessories
668
670
672
674
Clinician
Clinician Test, PT

Fig.65

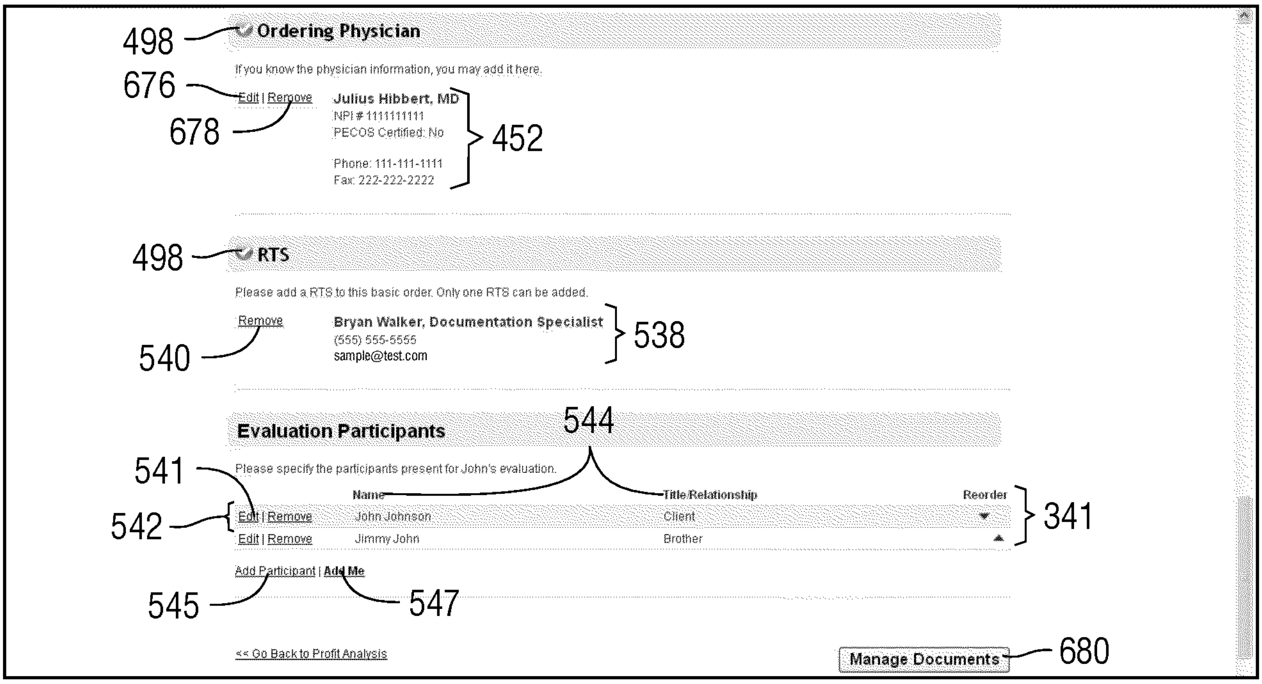

498
Ordering Physician
If you know the physician information, you may add it here.
676
Edit | Remove
678
Julius Hibbert, MD
NPI # 1111111111
PECOS Certified: No
Phone: 111-111-1111
Fax: 222-222-2222
452
498
RTS
Please add a RTS to this basic order. Only one RTS can be added.
Remove
540
Bryan Walker, Documentation Specialist
(555) 555-5555
sample@test.com
538
Evaluation Participants
544
541
Please specify the participants present for John's evaluation.
Name
Title/Relationship
Reorder
542
Edit | Remove
John Johnson
Client
Edit | Remove
Jimmy John
Brother
341
Add Participant | Add Me
545
547
<< Go Back to Profit Analysis
Manage Documents
680

Fig.66

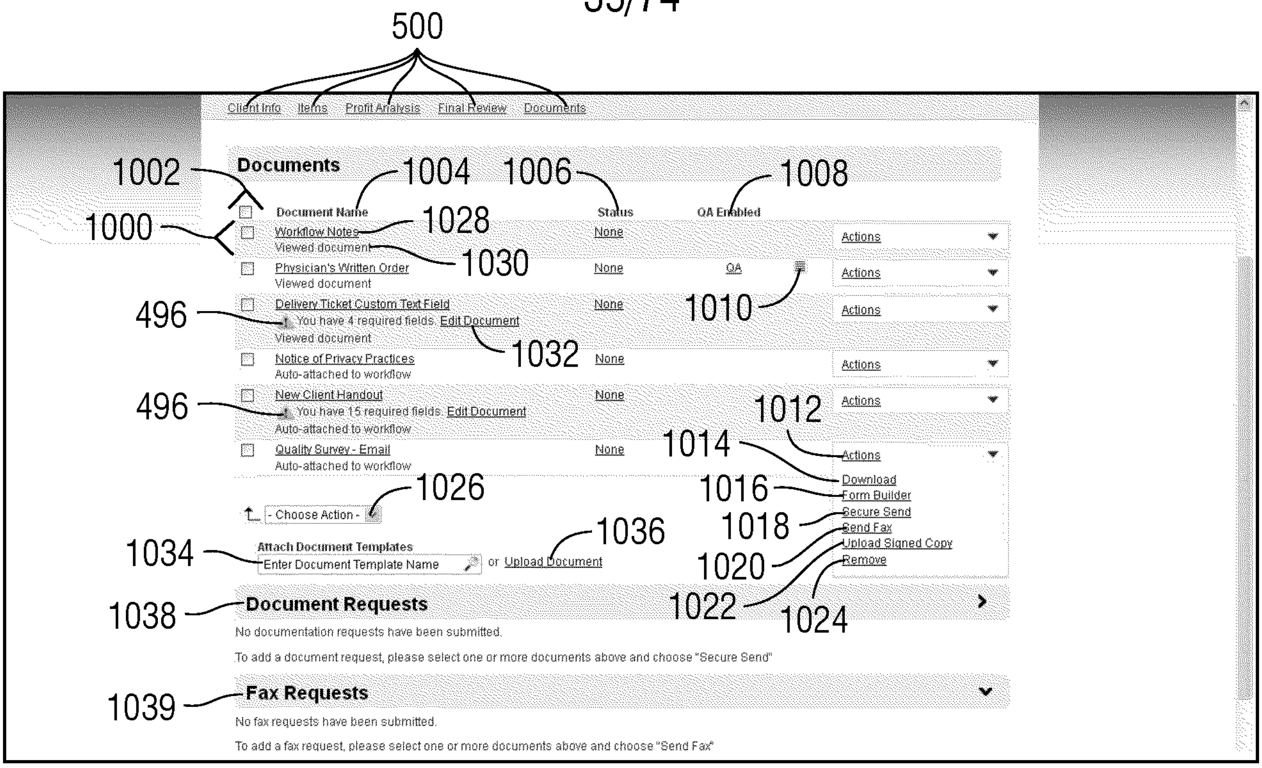

500
Client Info
Items
Profit Analysis
Final Review
Documents
Documents
1002
1004
1006
1008
1000
Document Name
Status
QA Enabled
Workflow Notes
Viewed document
1028
1030
None
Actions
Physician's Written Order
Viewed document
QA
Delivery Ticket Custom Text Field
You have 4 required fields. Edit Document
Viewed document
1010
496
1032
Notice of Privacy Practices
Auto-attached to workflow
New Client Handout
You have 15 required fields. Edit Document
Auto-attached to workflow
Quality Survey - Email
Auto-attached to workflow
1012
1014
Download
Form Builder
Secure Send
Send Fax
Upload Signed Copy
Remove
1016
1018
1020
1022
1024
1026
- Choose Action -
1034
Attach Document Templates
Enter Document Template Name
or Upload Document
1036
1038
Document Requests
No documentation requests have been submitted.
To add a document request, please select one or more documents above and choose "Secure Send"
1039
Fax Requests
No fax requests have been submitted.
To add a fax request, please select one or more documents above and choose "Send Fax"

Fig.67

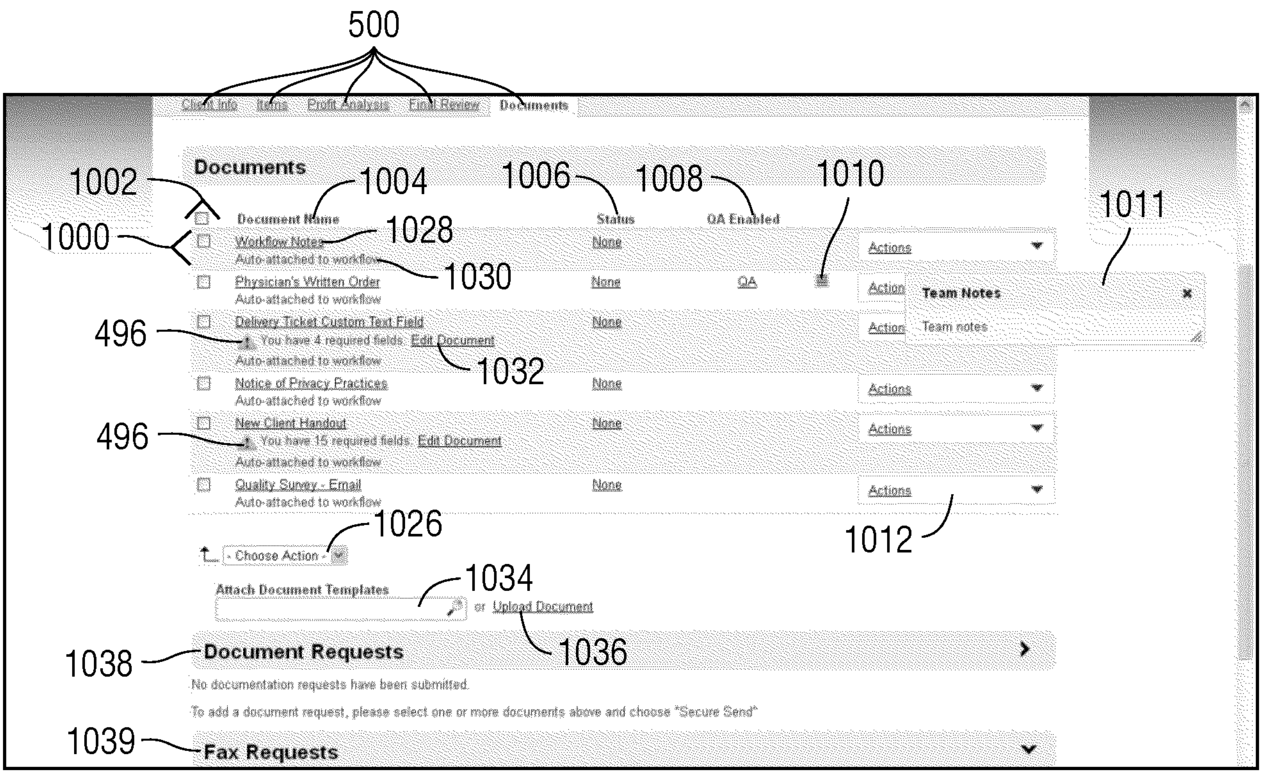
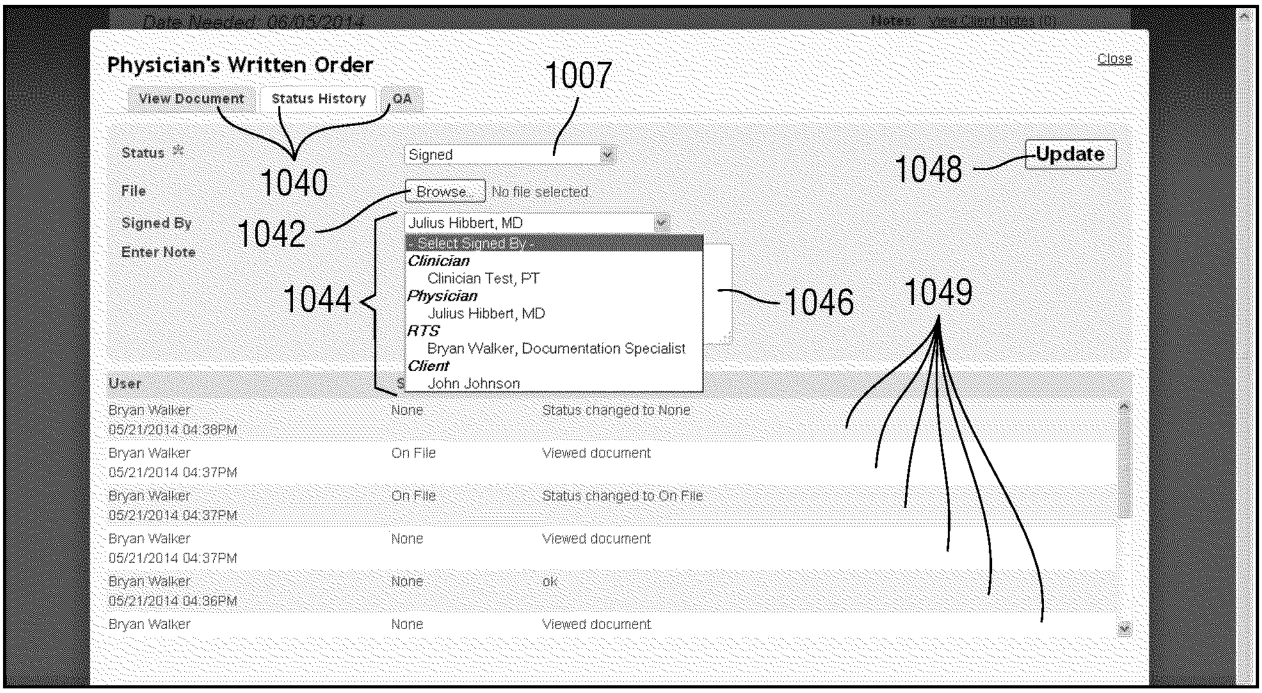
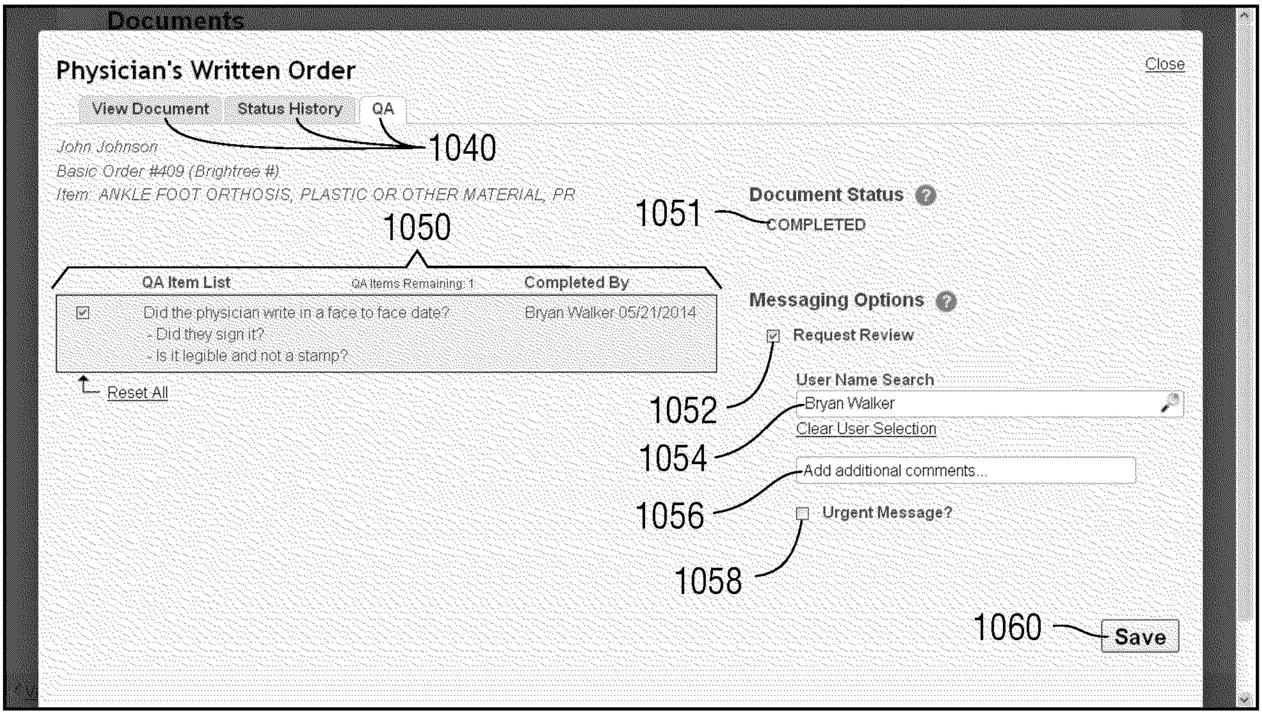

500
Client Info
Items
Profit Analysis
Final Review
Documents
Documents
1002
1004
1006
1008
1010
1011
1000
Document Name
Status
QA Enabled
Workflow Notes
Auto-attached to workflow
1028
1030
None
Actions
Physician's Written Order
QA
Team Notes
Team notes
Delivery Ticket Custom Text Field
You have 4 required fields. Edit Document
496
1032
Notice of Privacy Practices
New Client Handout
You have 15 required fields. Edit Document
Quality Survey - Email
1012
1026
- Choose Action -
1034
Attach Document Templates
or Upload Document
1036
1038
Document Requests
No documentation requests have been submitted.
To add a document request, please select one or more documents above and choose "Secure Send"
1039
Fax Requests

Fig.68



Date Needed: 06/05/2014
Notes: View Client Notes (0)
Physician's Written Order
Close
View Document
Status History
QA
1007
Status
Signed
1048
Update
1040
File
Browse...
No file selected.
Signed By
1042
Julius Hibbert, MD
Enter Note
- Select Signed By -
Clinician
Clinician Test, PT
Physician
Julius Hibbert, MD
RTS
Bryan Walker, Documentation Specialist
Client
John Johnson
1044
1046
1049
User
Bryan Walker 05/21/2014 04:38PM None Status changed to None
Bryan Walker 05/21/2014 04:37PM On File Viewed document
Bryan Walker 05/21/2014 04:37PM On File Status changed to On File
Bryan Walker 05/21/2014 04:37PM None Viewed document
Bryan Walker 05/21/2014 04:36PM None ok
Bryan Walker None Viewed document

Fig.69



Documents
Physician's Written Order
Close
View Document
Status History
QA
1040
John Johnson
Basic Order #409 (Brightree #)
Item: ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
1050
1051
Document Status
COMPLETED
QA Item List
QA Items Remaining: 1
Completed By
Did the physician write in a face to face date?
- Did they sign it?
- Is it legible and not a stamp?
Bryan Walker 05/21/2014
Reset All
Messaging Options
Request Review
1052
User Name Search
Bryan Walker
1054
Clear User Selection
Add additional comments...
1056
Urgent Message?
1058
1060
Save

Fig.70

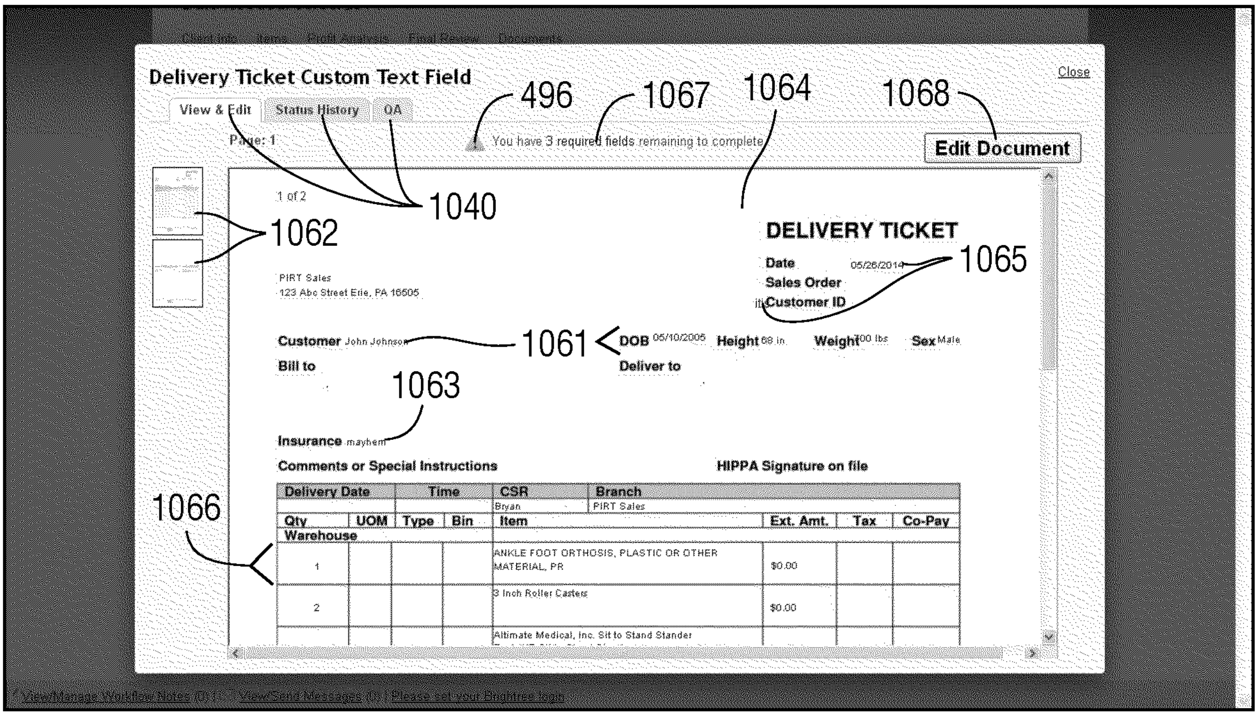

Delivery Ticket Custom Text Field
Close
View & Edit
Status History
QA
496
1067
1064
1068
You have 3 required fields remaining to complete
Edit Document
Page: 1
1 of 2
1040
1062
DELIVERY TICKET
Date 05/26/2014
Sales Order
Customer ID
1065
PIRT Sales
123 Abc Street Erie, PA 16505
Customer John Johnson
1061
DOB 05/10/2005
Height 68 in
Sex Male
Bill to
Deliver to
1063
Insurance mayhem
Comments or Special Instructions
HIPPA Signature on file
1066
Delivery Date
Time
CSR
Branch
Bryan
PIRT Sales
Qty
UOM
Type
Bin
Item
Ext. Amt.
Tax
Co-Pay
Warehouse
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
$0.00
3 Inch Roller Casters
Altimate Medical, Inc. Sit to Stand Stander

Fig. 71

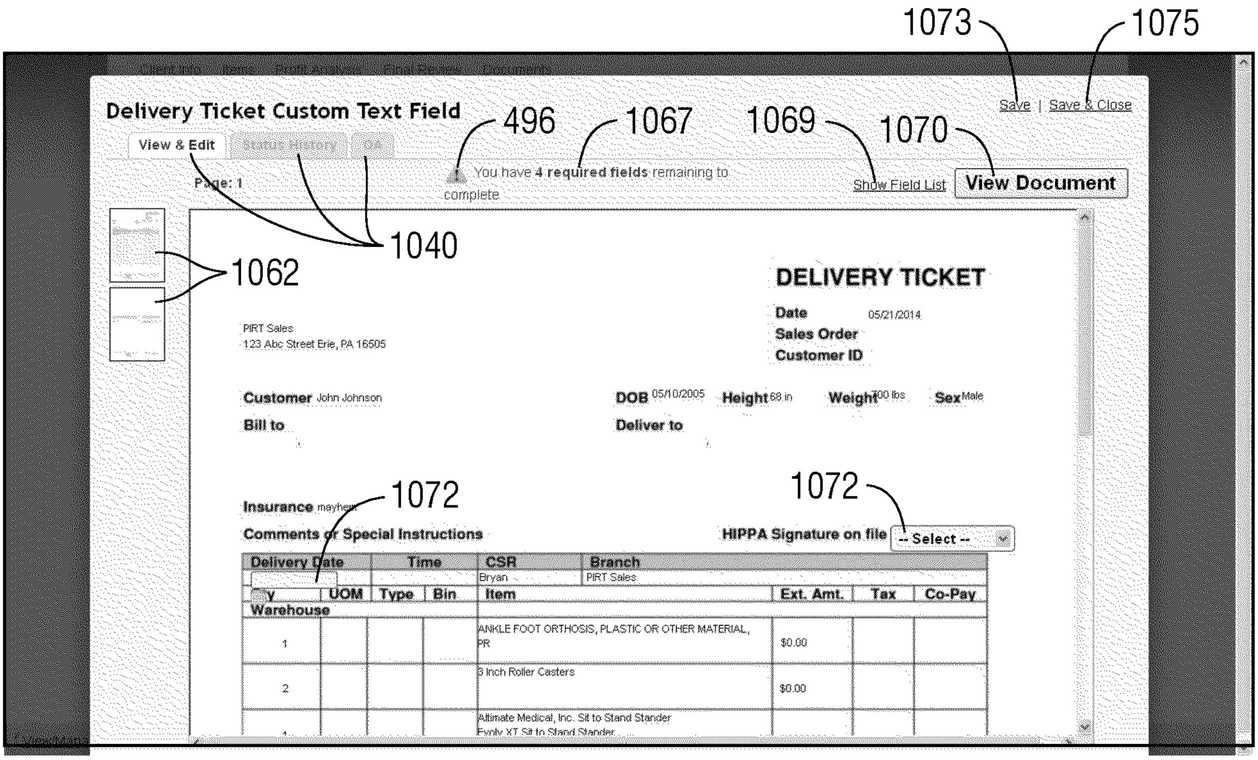

1073
1075
Save | Save & Close
Delivery Ticket Custom Text Field
View & Edit
Status History
QA
496
1067
1069
1070
You have 4 required fields remaining to complete
Show Field List
View Document
Page: 1
1040
1062
DELIVERY TICKET
Date 05/21/2014
Sales Order
Customer ID
PIRT Sales
123 Abc Street Erie, PA 16505
Customer John Johnson
DOB 05/10/2005
Height 68 in
Sex Male
Bill to
Deliver to
1072
1072
Insurance mayhem
Comments or Special Instructions
HIPPA Signature on file
-- Select --
Delivery Date
Time
CSR
Branch
Bryan
PIRT Sales
UOM
Type
Bin
Item
Ext. Amt.
Tax
Co-Pay
Warehouse
ANKLE FOOT ORTHOSIS, PLASTIC OR OTHER MATERIAL, PR
$0.00
3 Inch Roller Casters
Altimate Medical, Inc. Sit to Stand Stander
Evolv XT Sit to Stand Stander

Fig. 72

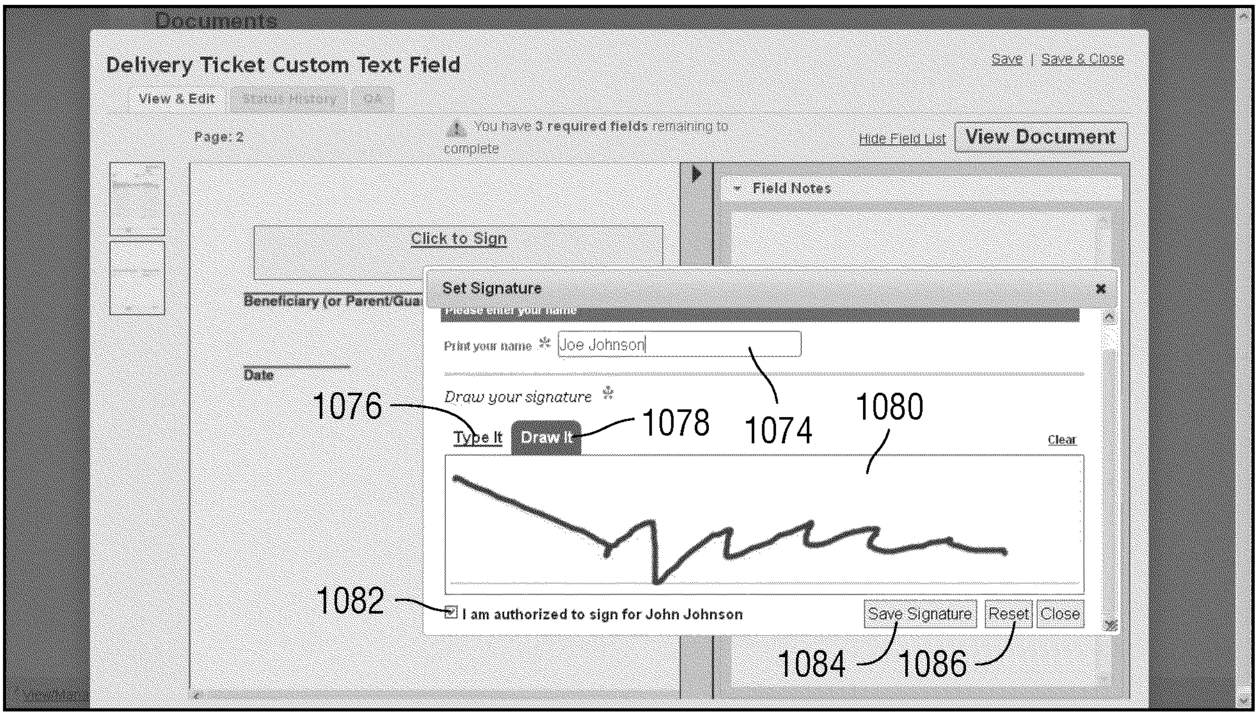

Documents
Delivery Ticket Custom Text Field
Save | Save & Close
View & Edit
Status History
QA
Page: 2
You have 3 required fields remaining to complete
Hide Field List
View Document
Field Notes
Click to Sign
Beneficiary (or Parent/Guai
Date
Set Signature
Please enter your name
Print your name
Joe Johnson
Draw your signature
Type It
Draw It
Clear
I am authorized to sign for John Johnson
Save Signature
Reset
Close
1074
1076
1078
1080
1082
1084
1086

Fig. 73

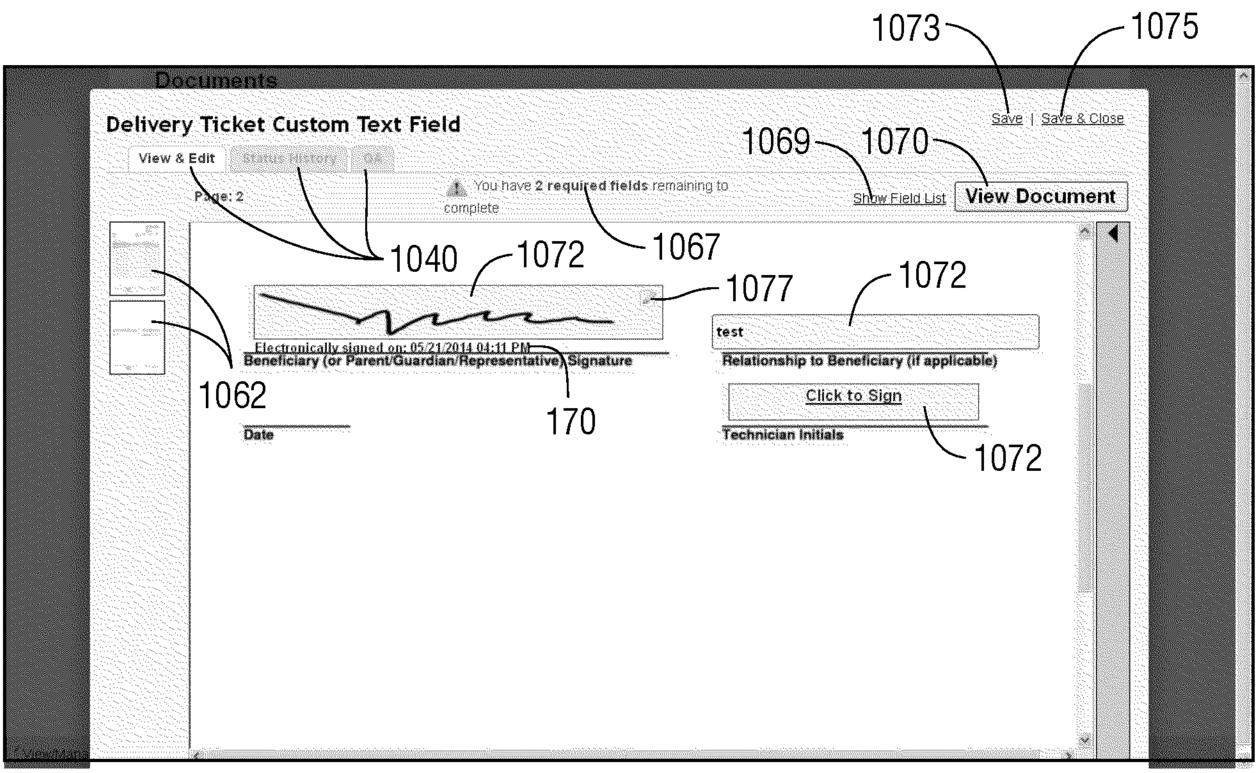

1073
1075
Documents
Delivery Ticket Custom Text Field
Save | Save & Close
View & Edit
Status History
QA
Page: 2
You have 2 required fields remaining to complete
Show Field List
View Document
1069
1070
1040
1072
1067
1077
1072
test
Electronically signed on: 05/21/2014 04:11 PM
Beneficiary (or Parent/Guardian/Representative) Signature
Relationship to Beneficiary (if applicable)
Click to Sign
Technician Initials
1062
170
1072
Date

Fig. 74

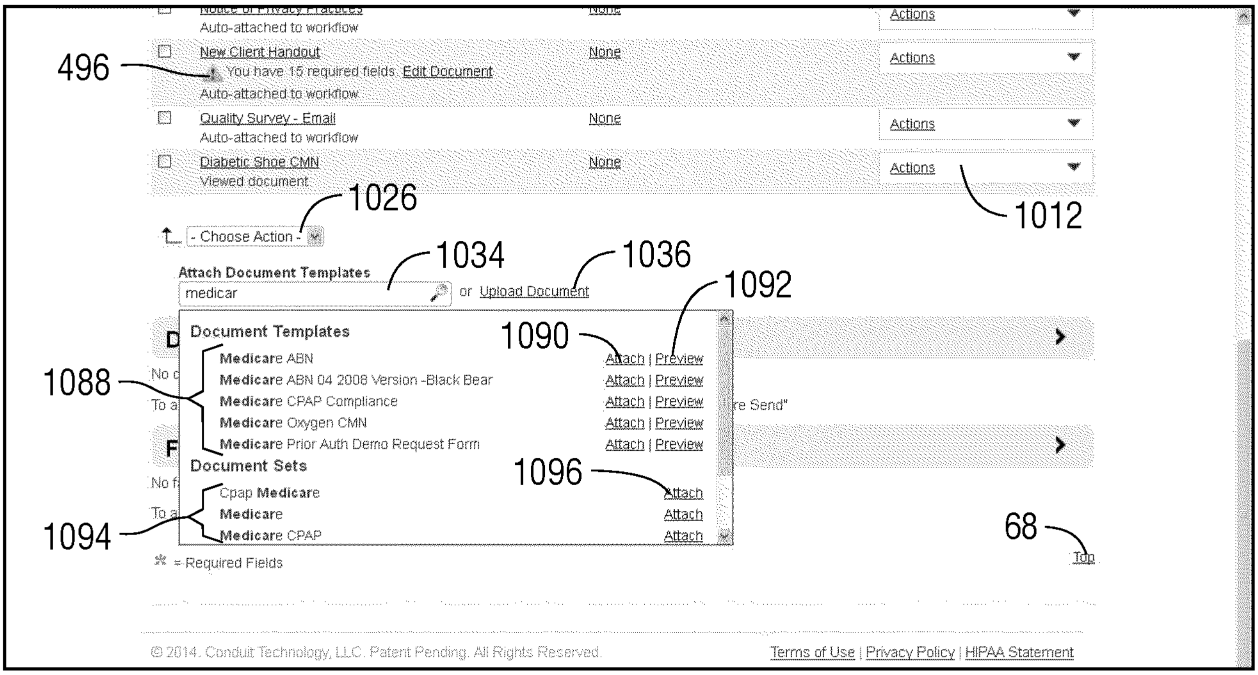

Auto-attached to workflow
New Client Handout
None
Actions
496
You have 15 required fields. Edit Document
Auto-attached to workflow
Quality Survey - Email
None
Actions
Auto-attached to workflow
Diabetic Shoe CMN
None
Actions
Viewed document
1026
1012
- Choose Action -
1034
1036
Attach Document Templates
medicar
or Upload Document
1092
Document Templates
1090
Attach | Preview
1088
Medicare ABN
Medicare ABN 04 2008 Version -Black Bear
Medicare CPAP Compliance
Medicare Oxygen CMN
Medicare Prior Auth Demo Request Form
Document Sets
1096
Cpap Medicare
Medicare
Medicare CPAP
Attach
1094
68
Top
= Required Fields
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Fig. 75

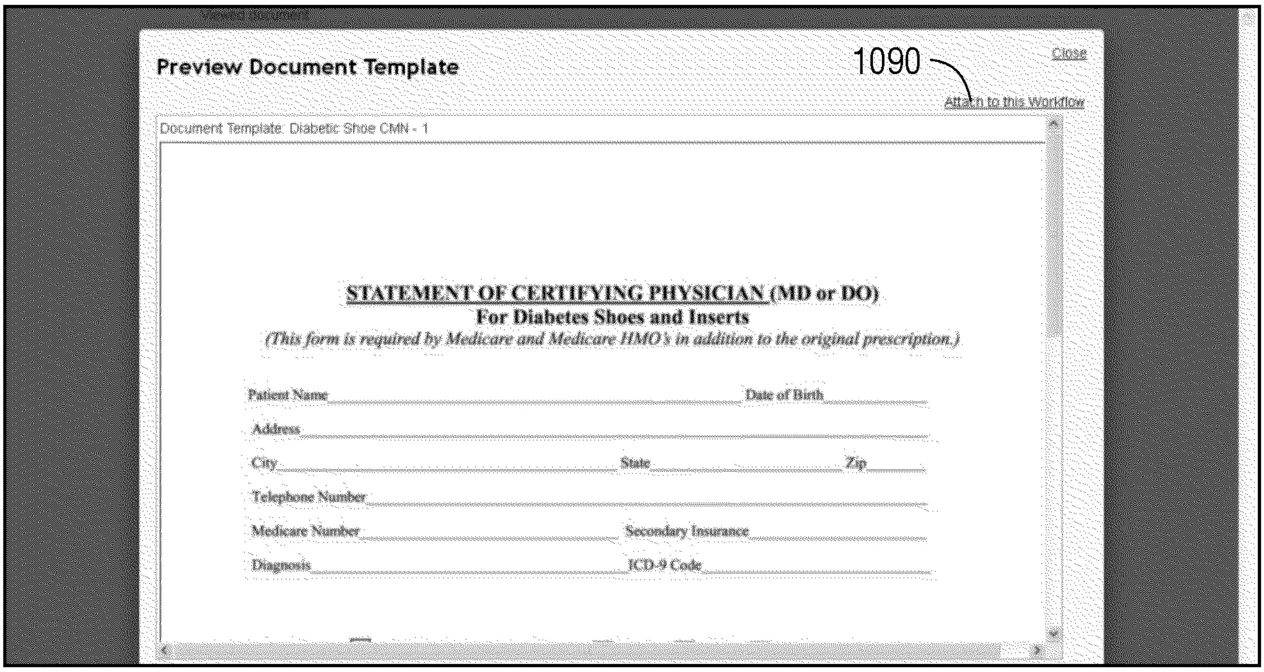

Preview Document Template
1090
Close
Attach to this Workflow
Document Template: Diabetic Shoe CMN - 1
STATEMENT OF CERTIFYING PHYSICIAN (MD or DO)
For Diabetes Shoes and Inserts
(This form is required by Medicare and Medicare HMO's in addition to the original prescription.)
Patient Name
Date of Birth
Address
City
State
Zip
Telephone Number
Medicare Number
Secondary Insurance
Diagnosis
ICD-9 Code

Fig. 76

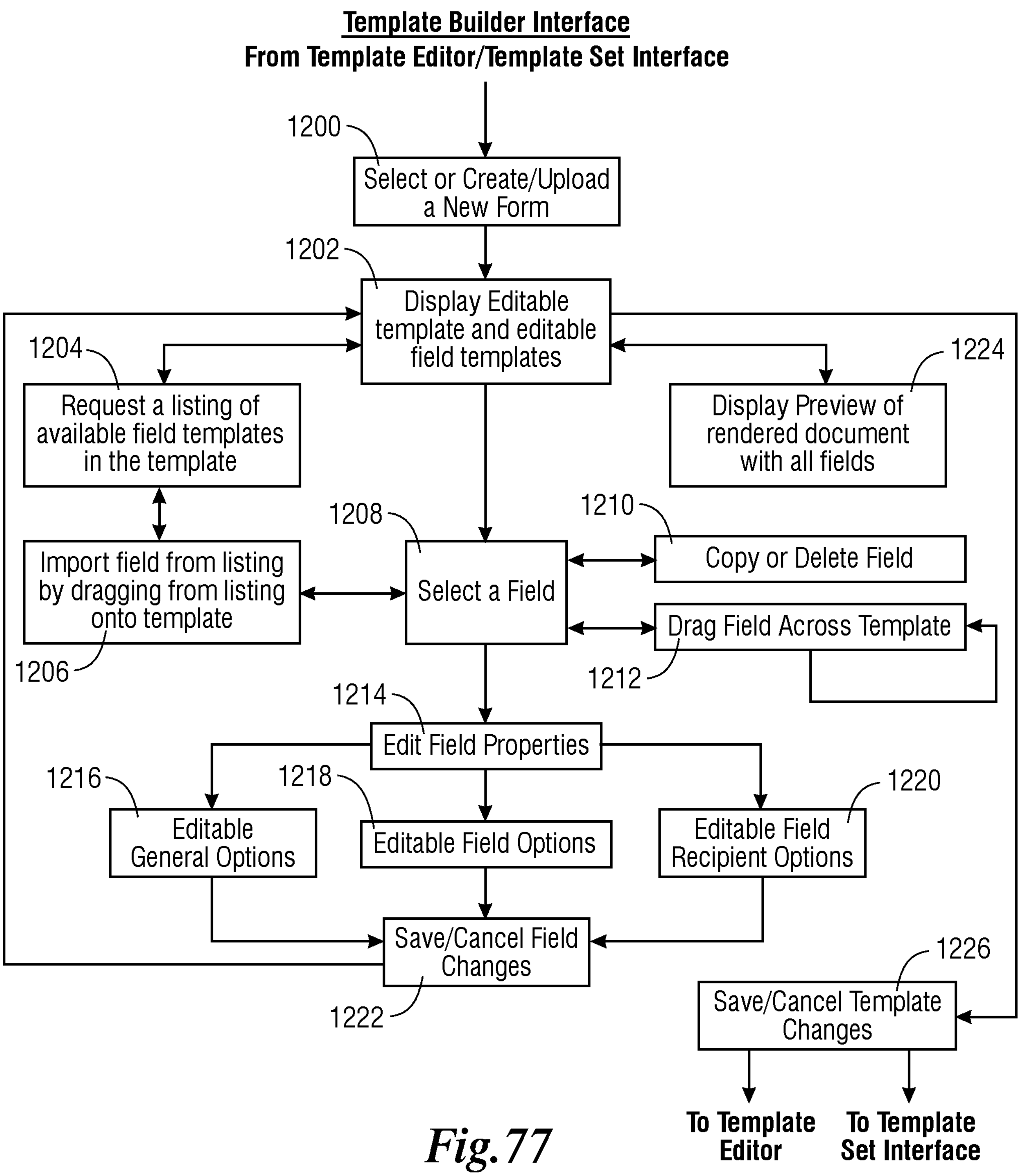

Template Builder Interface
From Template Editor/Template Set Interface
1200
Select or Create/Upload a New Form
1202
Display Editable template and editable field templates
1204
Request a listing of available field templates in the template
1224
Display Preview of rendered document with all fields
1208
1210
Import field from listing by dragging from listing onto template
Select a Field
Copy or Delete Field
Drag Field Across Template
1206
1212
1214
Edit Field Properties
1216
1218
1220
Editable General Options
Editable Field Options
Editable Field Recipient Options
Save/Cancel Field Changes
1226
1222
Save/Cancel Template Changes
To Template Editor
To Template Set Interface

Fig. 77

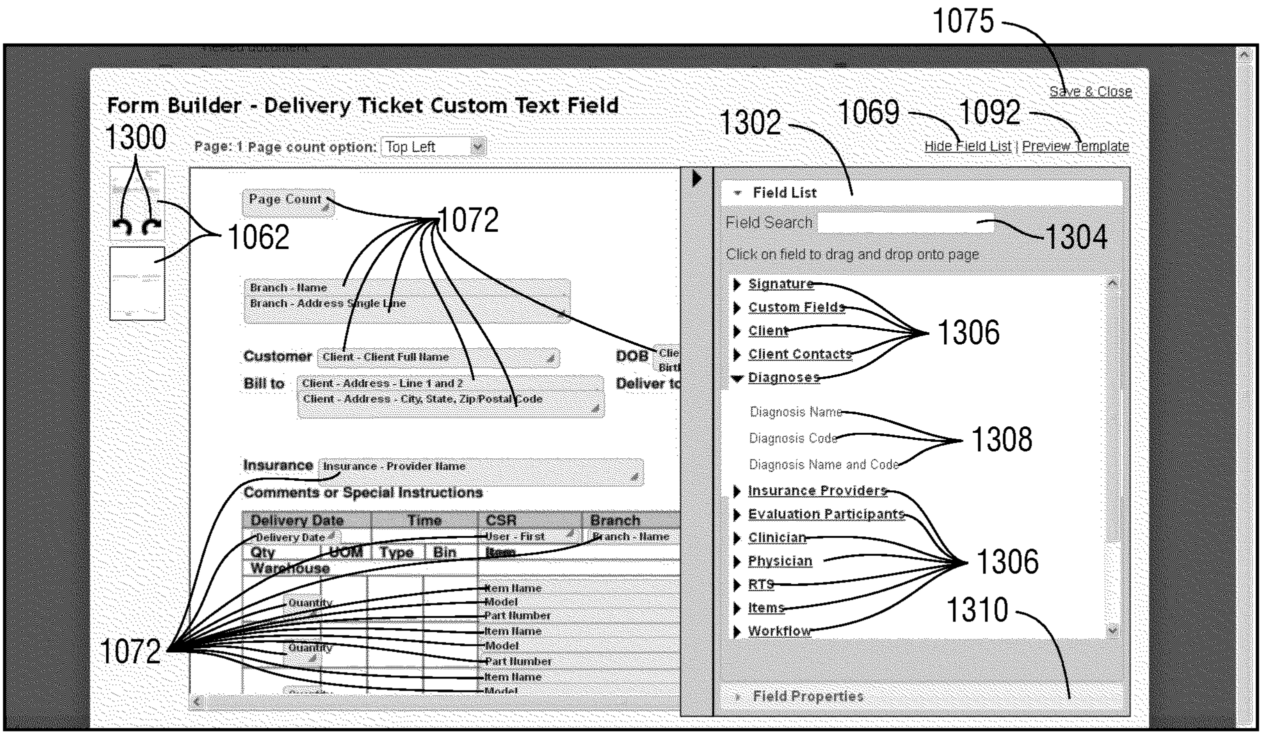

1075
Save & Close
Form Builder - Delivery Ticket Custom Text Field
1300
1302
1069
1092
Hide Field List | Preview Template
Page: 1 Page count option: Top Left
Page Count
1062
1072
Field List
Field Search
1304
Click on field to drag and drop onto page
Signature
Custom Fields
Client
Client Contacts
Diagnoses
1306
Diagnosis Name
Diagnosis Code
Diagnosis Name and Code
1308
Branch - Name
Branch - Address Single Line
Customer
Client - Client Full Name
DOB
Bill to
Client - Address - Line 1 and 2
Client - Address - City, State, Zip/Postal Code
Insurance
Insurance - Provider Name
Comments or Special Instructions
Delivery Date
Time
CSR
Branch
User - First
Branch - Name
Qty
UOM
Type
Bin
Item
Warehouse
Quantity
Item Name
Model
Part Number
Insurance Providers
Evaluation Participants
Clinician
Physician
RTS
Items
Workflow
1310
Field Properties

Fig. 78

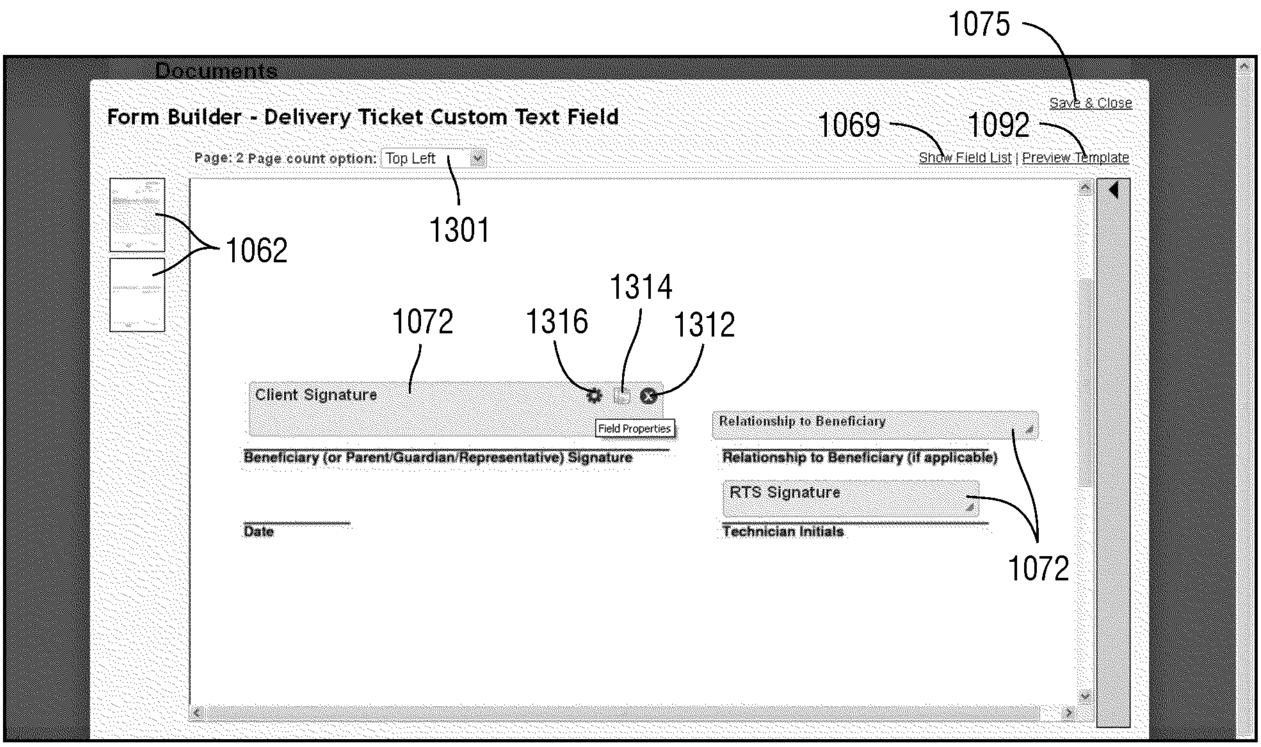

1075
Documents
Save & Close
Form Builder - Delivery Ticket Custom Text Field
1069
1092
Show Field List | Preview Template
Page: 2 Page count option: Top Left
1301
1062
1314
1072
1316
1312
Client Signature
Field Properties
Relationship to Beneficiary
Beneficiary (or Parent/Guardian/Representative) Signature
Relationship to Beneficiary (if applicable)
RTS Signature
Date
Technician Initials
1072

Fig. 79

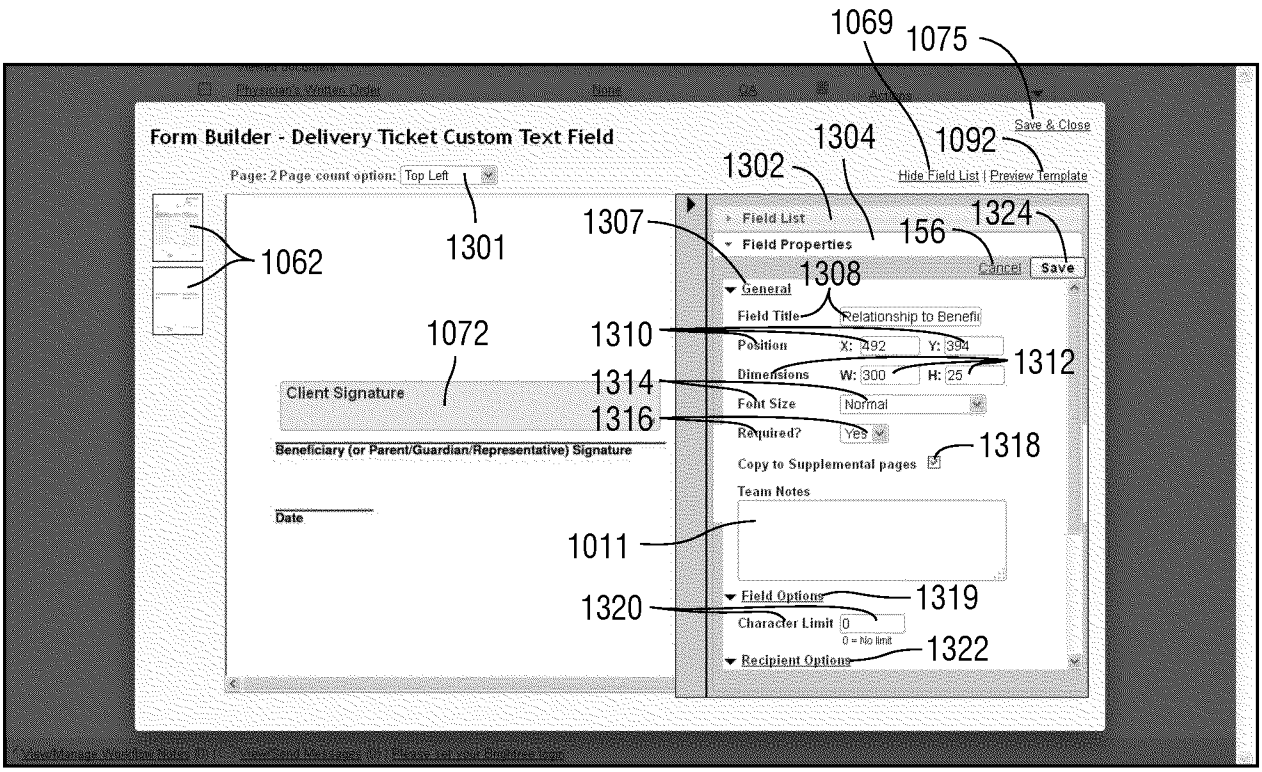

Form Builder - Delivery Ticket Custom Text Field
Page: 2 Page count option: Top Left
Hide Field List | Preview Template
Save & Close
Field List
Field Properties
Cancel
Save
General
Field Title
Relationship to Benefi
Position
X: 492
Y: 394
Dimensions
W: 300
H: 25
Font Size
Normal
Required?
Yes
Copy to Supplemental pages
Team Notes
Field Options
Character Limit
0 = No limit
Recipient Options
Client Signature
Beneficiary (or Parent/Guardian/Representative) Signature
Date
1069
1075
1092
1304
1302
1324
156
1307
1308
1062
1301
1072
1310
1312
1314
1316
1318
1011
1319
1320
1322

Fig.80

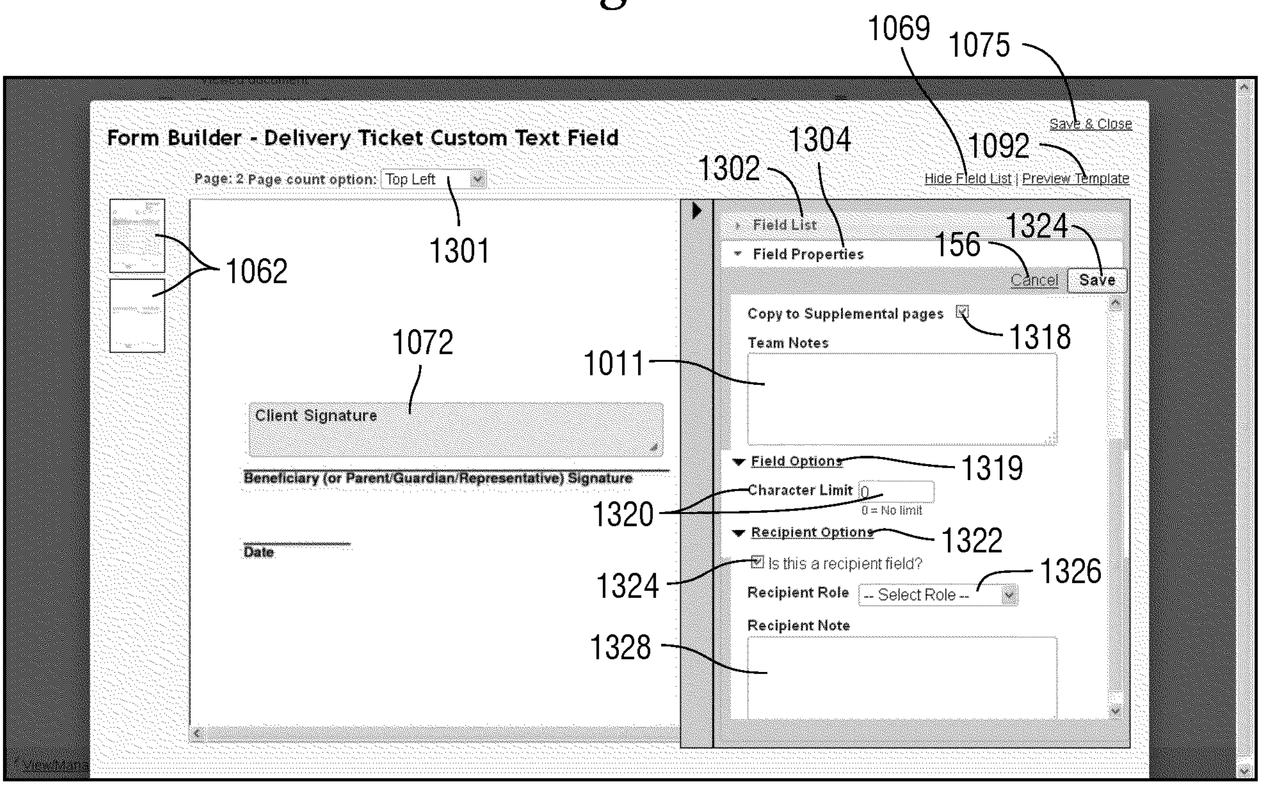

Form Builder - Delivery Ticket Custom Text Field
Page: 2 Page count option: Top Left
Hide Field List | Preview Template
Save & Close
Field List
Field Properties
Cancel
Save
Copy to Supplemental pages
Team Notes
Field Options
Character Limit
0 = No limit
Recipient Options
Is this a recipient field?
Recipient Role
-- Select Role --
Recipient Note
Client Signature
Beneficiary (or Parent/Guardian/Representative) Signature
Date
1069
1075
1092
1304
1302
1324
156
1062
1301
1072
1011
1318
1319
1320
1322
1324
1326
1328

Fig.81

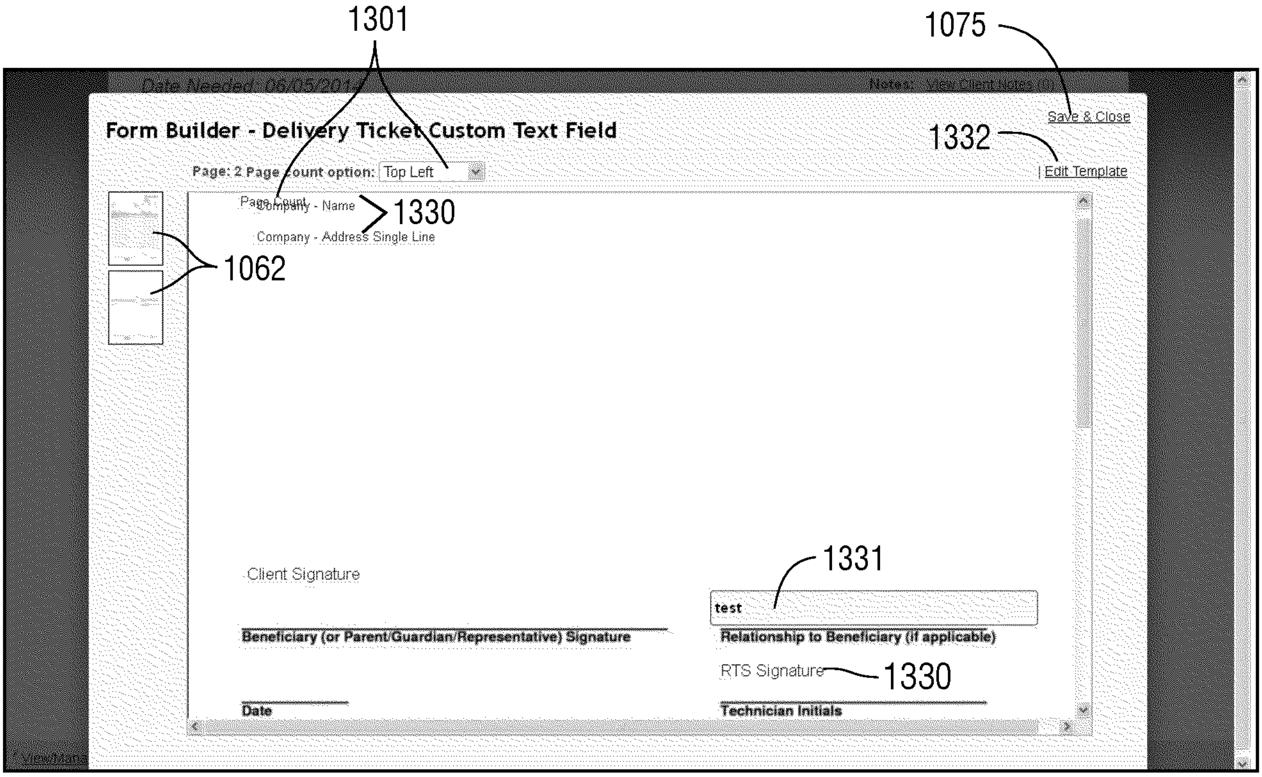

1301
1075
Date Needed: 06/05/2014
Notes: View Client Notes (0)
Save & Close
Form Builder - Delivery Ticket Custom Text Field
1332
Page: 2 Page Count option: Top Left
| Edit Template
Page Count
Company - Name
1330
Company - Address Single Line
1062
1331
Client Signature
test
Beneficiary (or Parent/Guardian/Representative) Signature
Relationship to Beneficiary (if applicable)
RTS Signature
1330
Date
Technician Initials

Fig.82

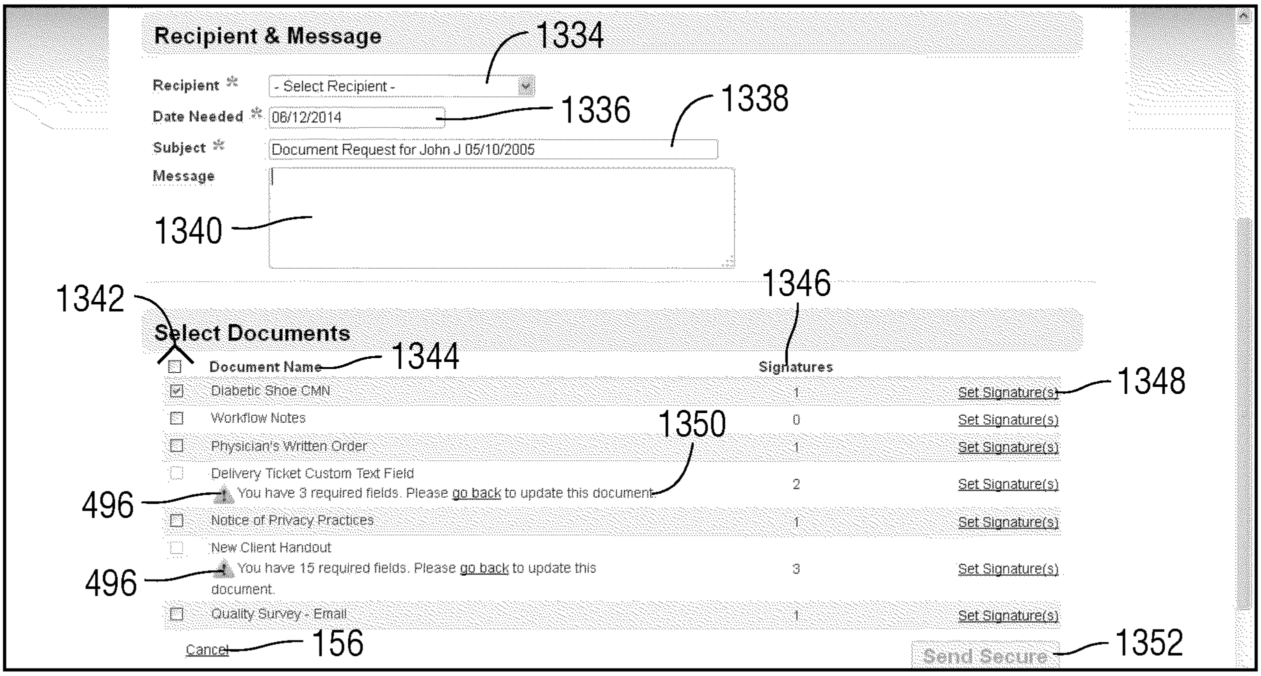

Recipient & Message
1334
Recipient
- Select Recipient -
Date Needed
06/12/2014
1336
1338
Subject
Document Request for John J 05/10/2005
Message
1340
1342
1346
Select Documents
Document Name
1344
Signatures
Diabetic Shoe CMN
1
Set Signature(s)
1348
Workflow Notes
0
Set Signature(s)
Physician's Written Order
1
Set Signature(s)
1350
Delivery Ticket Custom Text Field
496
You have 3 required fields. Please go back to update this document
2
Set Signature(s)
Notice of Privacy Practices
1
Set Signature(s)
New Client Handout
496
You have 15 required fields. Please go back to update this document.
3
Set Signature(s)
Quality Survey - Email
1
Set Signature(s)
Cancel
156
Send Secure
1352

Fig.83

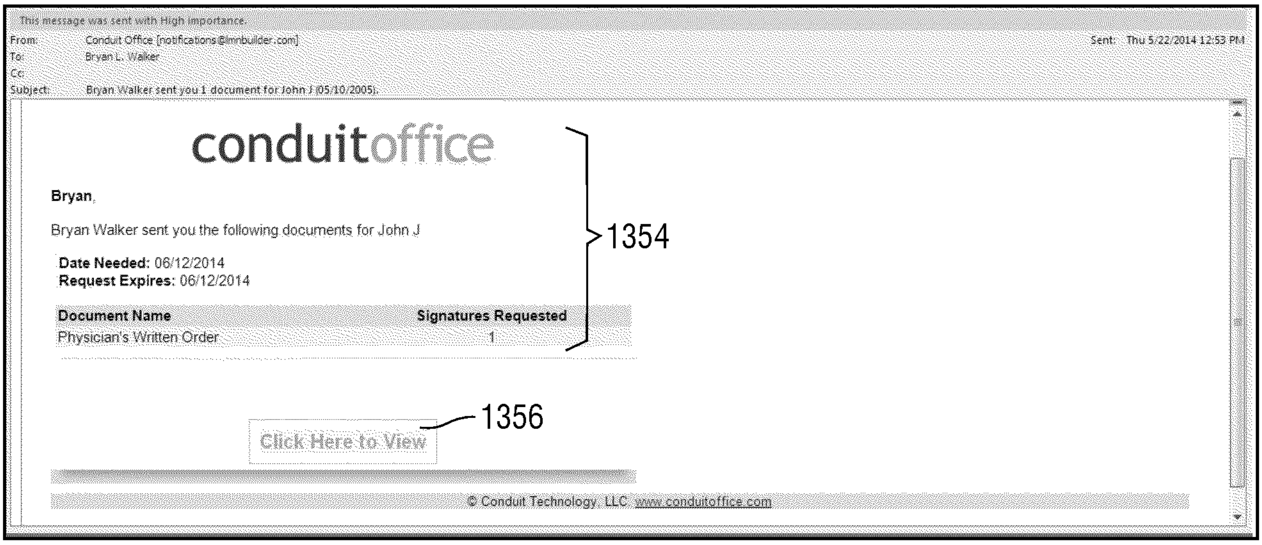

This message was sent with High importance.
From: Conduit Office [notifications@lmnbuilder.com]
Sent: Thu 5/22/2014 12:53 PM
To: Bryan L. Walker
Cc:
Subject: Bryan Walker sent you 1 document for John J (05/10/2005).
conduitoffice
Bryan,
Bryan Walker sent you the following documents for John J
Date Needed: 06/12/2014
Request Expires: 06/12/2014
Document Name
Signatures Requested
Physician's Written Order
1
1354
Click Here to View
1356
© Conduit Technology, LLC www.conduitoffice.com

Fig.84

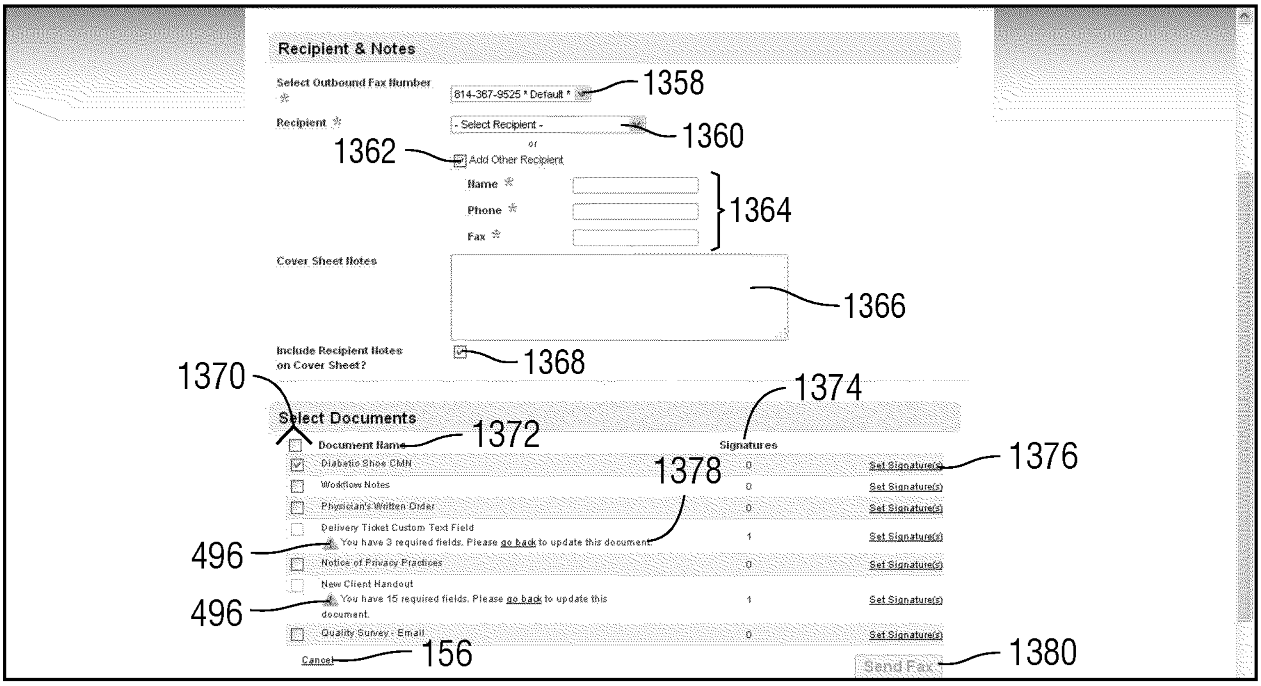

Recipient & Notes
Select Outbound Fax Number
814-367-9525 * Default *
1358
Recipient
- Select Recipient -
1360
or
1362
Add Other Recipient
Name
Phone
Fax
1364
Cover Sheet Notes
1366
Include Recipient Notes on Cover Sheet?
1368
1370
1374
Select Documents
Document Name
1372
Signatures
Diabetic Shoe CMN
0
Set Signature(s)
1376
Workflow Notes
0
Set Signature(s)
1378
Physician's Written Order
0
Set Signature(s)
Delivery Ticket Custom Text Field
496
You have 3 required fields. Please go back to update this document.
1
Set Signature(s)
Notice of Privacy Practices
0
Set Signature(s)
New Client Handout
496
You have 15 required fields. Please go back to update this document.
1
Set Signature(s)
Quality Survey - Email
0
Set Signature(s)
Cancel
156
Send Fax
1380

Fig.85

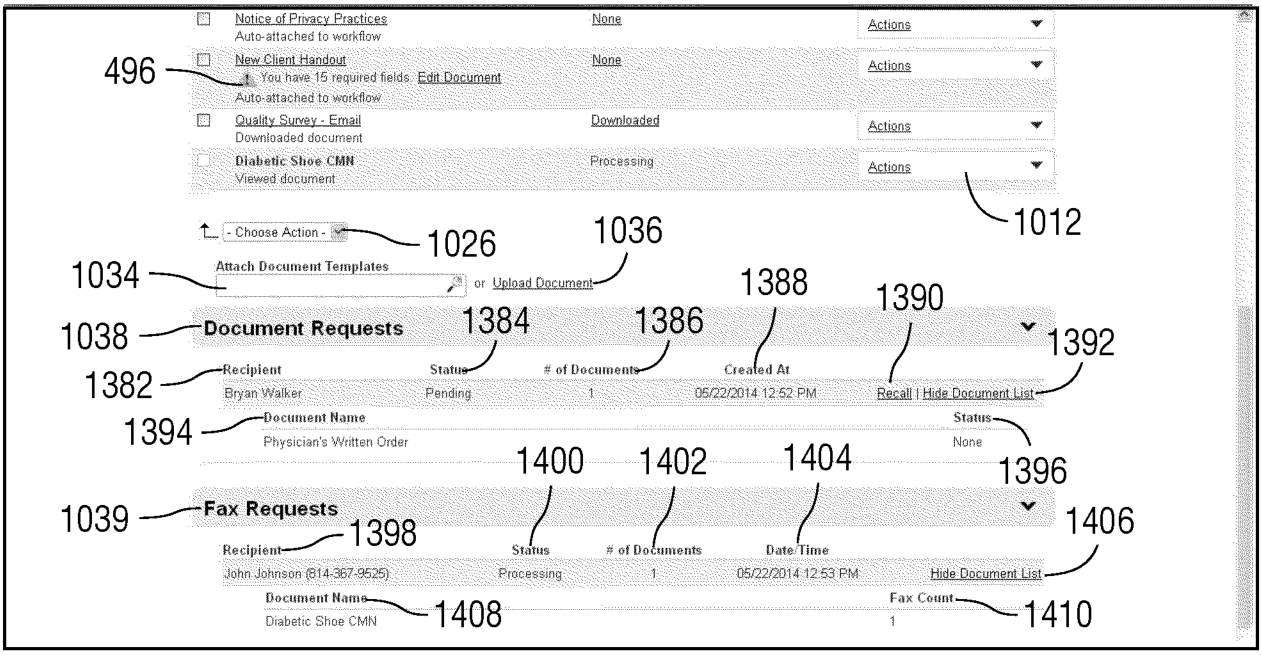

Notice of Privacy Practices
Auto-attached to workflow
None
Actions
496
New Client Handout
You have 15 required fields. Edit Document
Auto-attached to workflow
Quality Survey - Email
Downloaded document
Downloaded
Diabetic Shoe CMN
Viewed document
Processing
1012
- Choose Action -
1026
1036
1034
Attach Document Templates
or Upload Document
1388
1390
1038
Document Requests
1384
1386
1392
1382
Recipient
Status
# of Documents
Created At
Bryan Walker
Pending
1
05/22/2014 12:52 PM
Recall | Hide Document List
1394
Document Name
Physician's Written Order
Status
None
1400
1402
1404
1396
1039
Fax Requests
1398
1406
Recipient
Status
# of Documents
Date/Time
John Johnson (814-367-9525)
Processing
1
05/22/2014 12:53 PM
Hide Document List
Document Name
Diabetic Shoe CMN
1408
Fax Count
1
1410

Fig.86

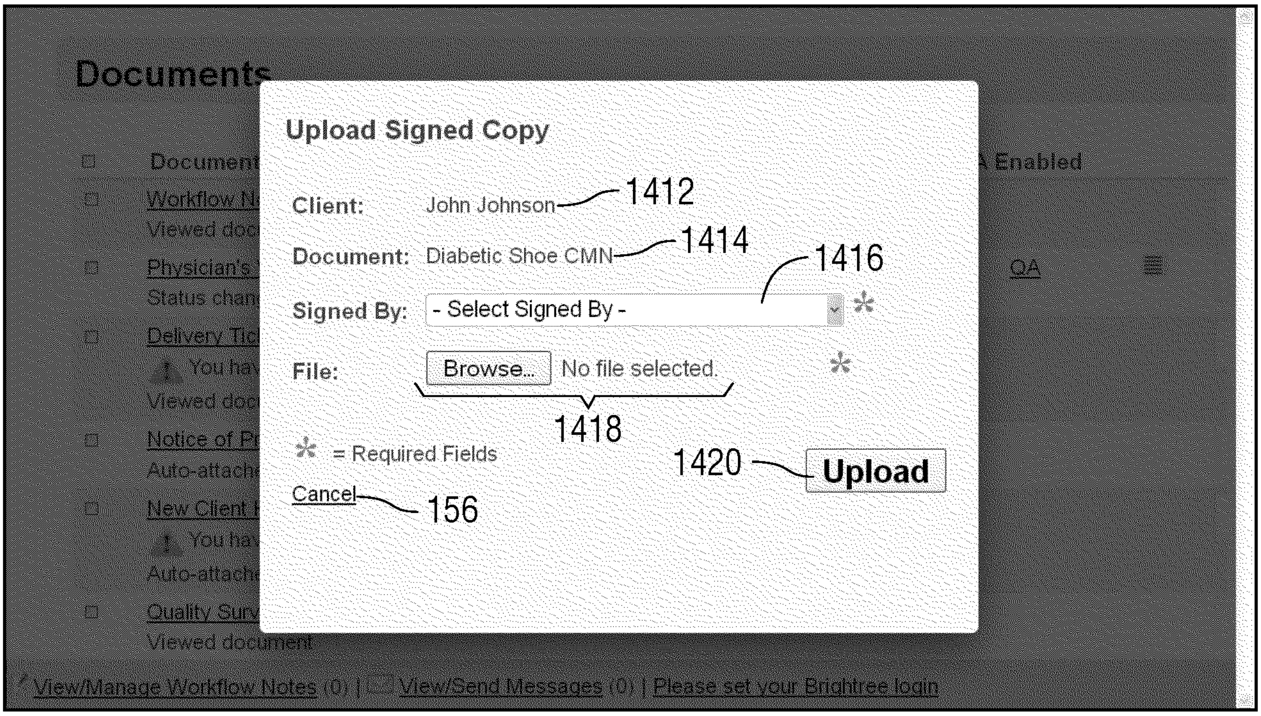

Documents
Upload Signed Copy
Client:
John Johnson
1412
Document:
Diabetic Shoe CMN
1414
1416
Signed By:
- Select Signed By -
File:
Browse...
No file selected.
1418
= Required Fields
1420
Upload
Cancel
156
View/Manage Workflow Notes (0) | View/Send Messages (0) | Please set your Brightree login

Fig.87

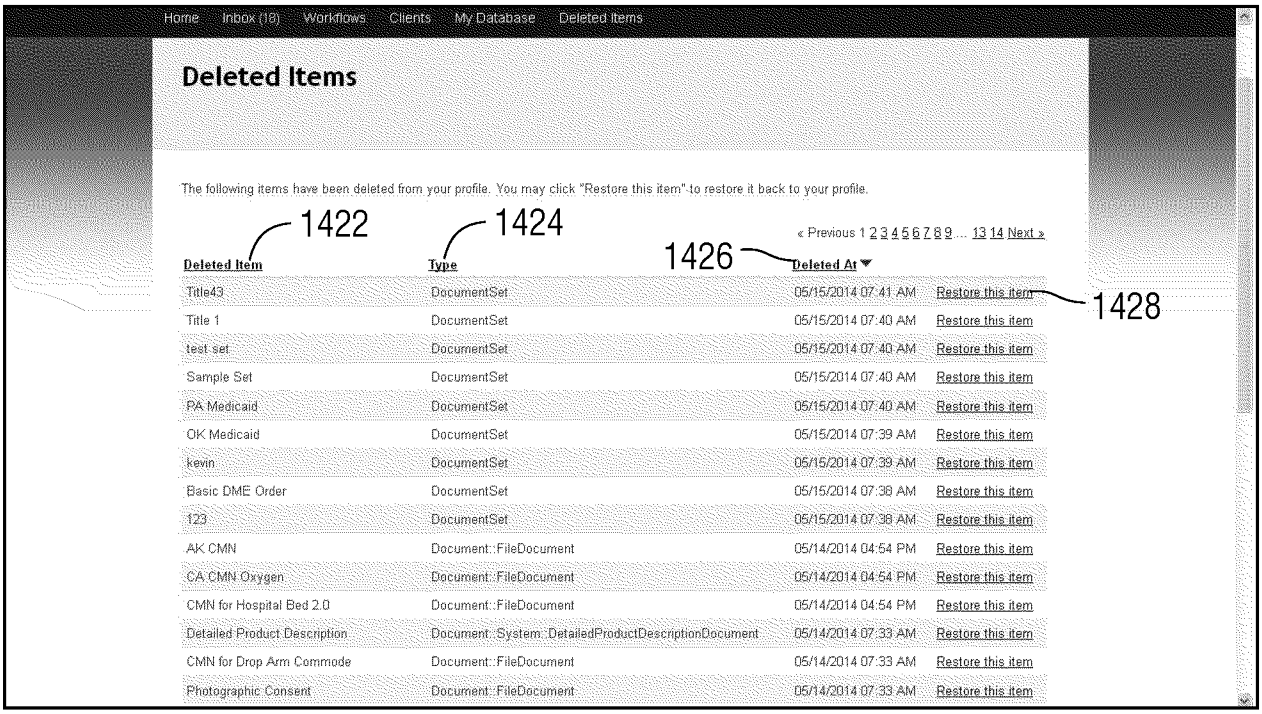

Home
Inbox (18)
Workflows
Clients
My Database
Deleted Items
Deleted Items
The following items have been deleted from your profile. You may click "Restore this item" to restore it back to your profile.
1422
1424
1426
1428
« Previous 1 2 3 4 5 6 7 8 9 ... 13 14 Next »
Deleted Item
Type
Deleted At
Title43 DocumentSet 05/15/2014 07:41 AM Restore this item
Title 1 DocumentSet 05/15/2014 07:40 AM Restore this item
test set DocumentSet 05/15/2014 07:40 AM Restore this item
Sample Set DocumentSet 05/15/2014 07:40 AM Restore this item
PA Medicaid DocumentSet 05/15/2014 07:40 AM Restore this item
OK Medicaid DocumentSet 05/15/2014 07:39 AM Restore this item
kevin DocumentSet 05/15/2014 07:39 AM Restore this item
Basic DME Order DocumentSet 05/15/2014 07:38 AM Restore this item
123 DocumentSet 05/15/2014 07:38 AM Restore this item
AK CMN Document::FileDocument 05/14/2014 04:54 PM Restore this item
CA CMN Oxygen Document::FileDocument 05/14/2014 04:54 PM Restore this item
CMN for Hospital Bed 2.0 Document::FileDocument 05/14/2014 04:54 PM Restore this item
Detailed Product Description Document::System::DetailedProductDescriptionDocument 05/14/2014 07:33 AM Restore this item
CMN for Drop Arm Commode Document::FileDocument 05/14/2014 07:33 AM Restore this item
Photographic Consent Document::FileDocument 05/14/2014 07:33 AM Restore this item

Fig.88

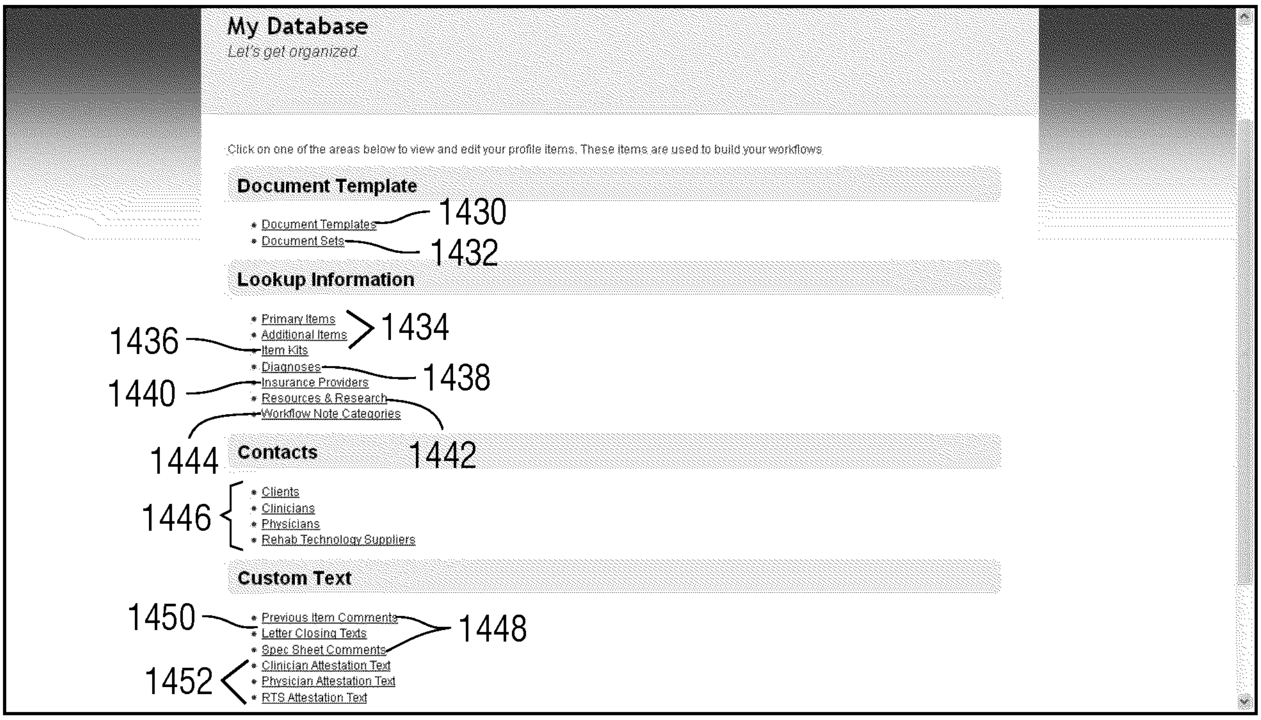

My Database
Let's get organized
Click on one of the areas below to view and edit your profile items. These items are used to build your workflows.
Document Template
Document Templates
Document Sets
1430
1432
Lookup Information
Primary Items
Additional Items
Item Kits
Diagnoses
Insurance Providers
Resources & Research
Workflow Note Categories
1434
1436
1438
1440
1442
1444
Contacts
Clients
Clinicians
Physicians
Rehab Technology Suppliers
1446
Custom Text
Previous Item Comments
Letter Closing Texts
Spec Sheet Comments
Clinician Attestation Text
Physician Attestation Text
RTS Attestation Text
1448
1450
1452

Fig.89

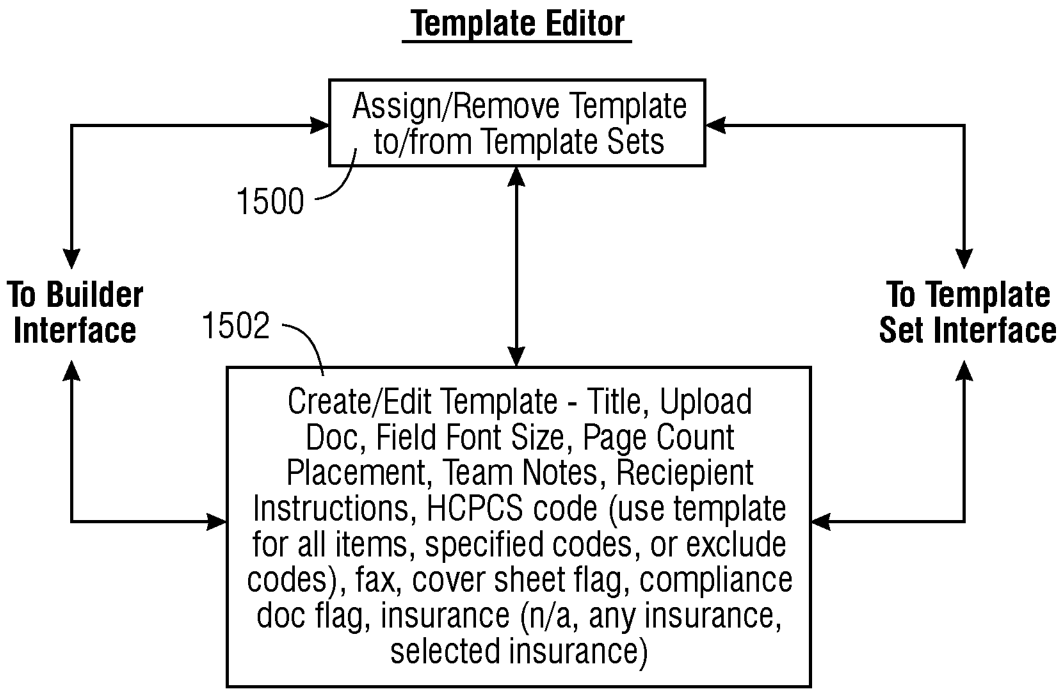

Template Editor
Assign/Remove Template to/from Template Sets
1500
To Builder Interface
1502
To Template Set Interface
Create/Edit Template - Title, Upload Doc, Field Font Size, Page Count Placement, Team Notes, Reciepient Instructions, HCPCS code (use template for all items, specified codes, or exclude codes), fax, cover sheet flag, compliance doc flag, insurance (n/a, any insurance, selected insurance)

Fig.90

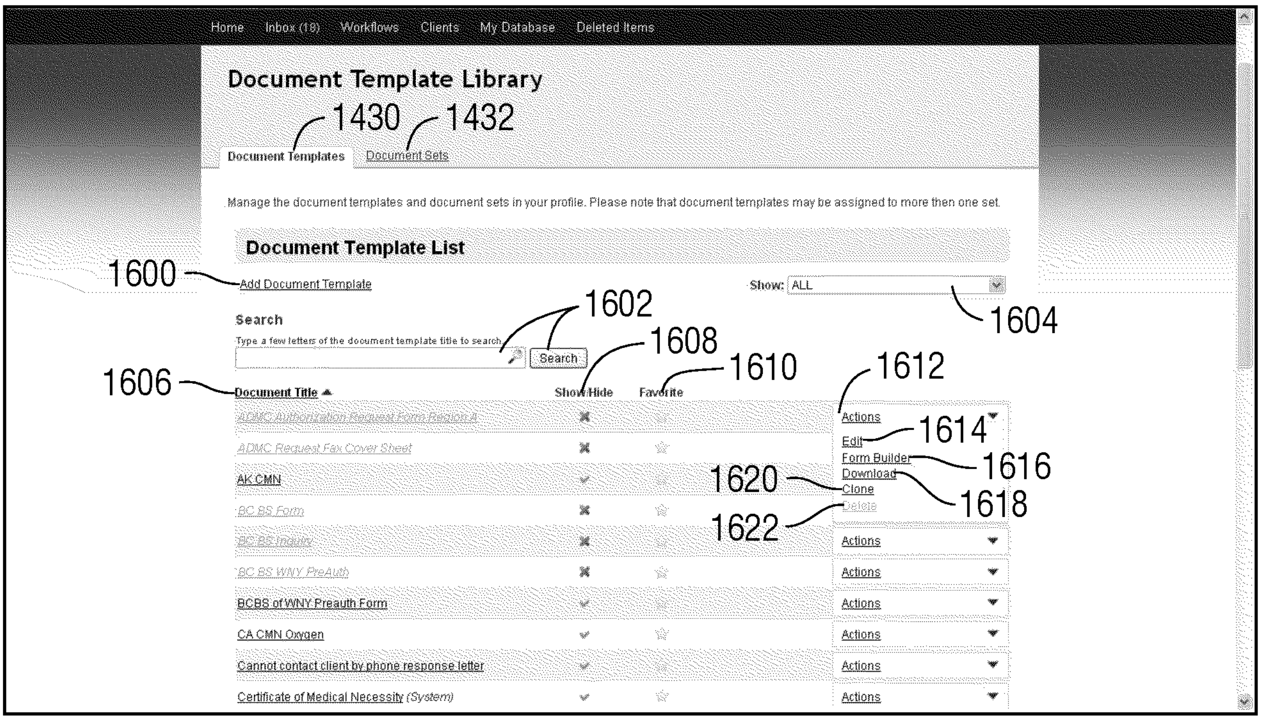
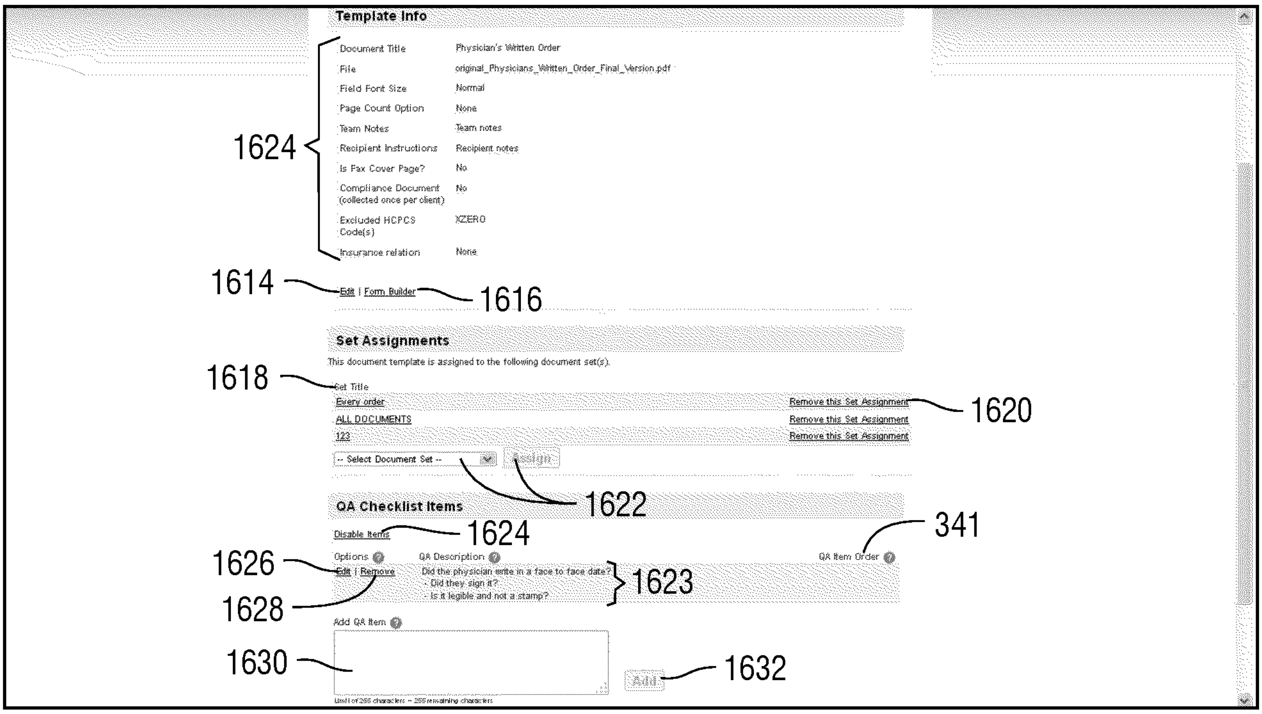
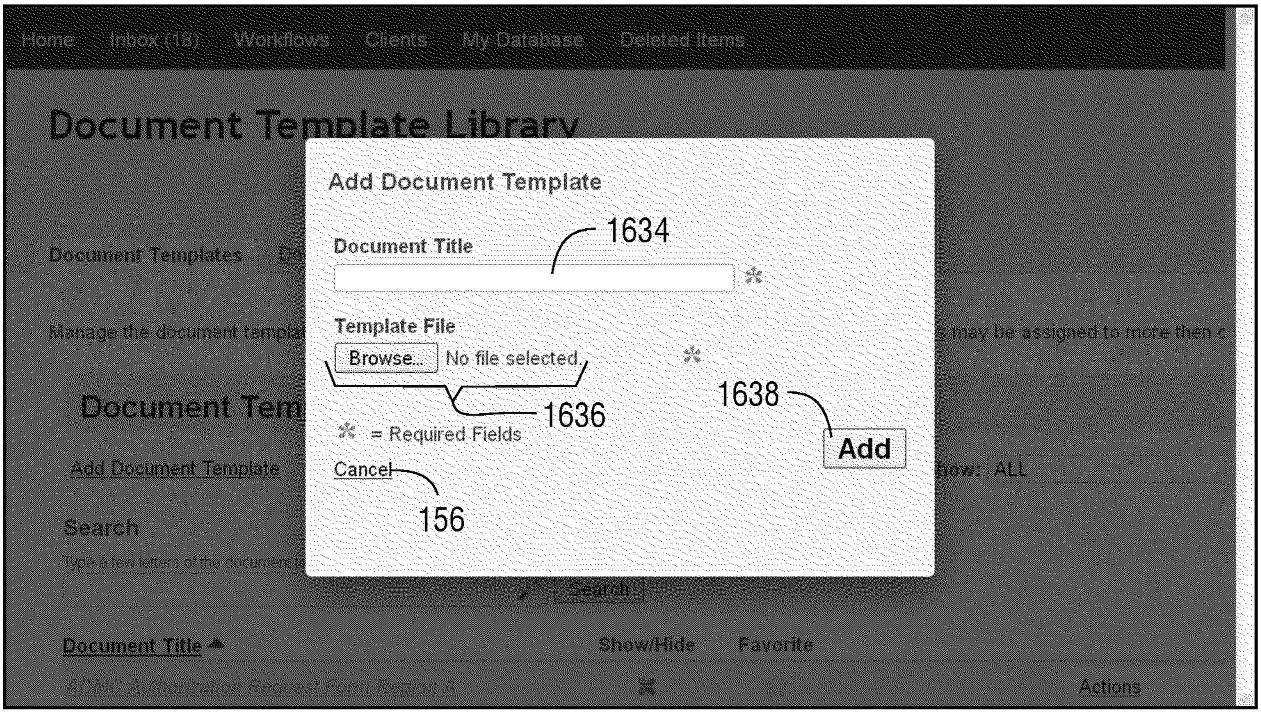

Home Inbox (18) Workflows Clients My Database Deleted Items
Document Template Library
1430
1432
Document Templates
Document Sets
Manage the document templates and document sets in your profile. Please note that document templates may be assigned to more then one set.
Document Template List
1600
Add Document Template
Show: ALL
1604
Search
Type a few letters of the document template title to search
Search
1602
1608
1610
1612
1606
Document Title
Show/Hide
Favorite
Actions
Edit
1614
Form Builder
1616
Download
Clone
1618
1620
Delete
1622
ADMC Authorization Request Form Region A
ADMC Request Fax Cover Sheet
AK CMN
BC BS Form
BC BS Inquiry
BC BS WNY PreAuth
BCBS of WNY Preauth Form
CA CMN Oxygen
Cannot contact client by phone response letter
Certificate of Medical Necessity (System)

Fig.91



Template Info
Document Title
Physician's Written Order
File
original_Physicians_Written_Order_Final_Version.pdf
Field Font Size
Normal
Page Count Option
None
Team Notes
Team notes
Recipient Instructions
Recipient notes
Is Fax Cover Page?
No
Compliance Document (collected once per client)
No
Excluded HCPCS Code(s)
XZERO
Insurance relation
None
1624
1614
Edit | Form Builder
1616
Set Assignments
This document template is assigned to the following document set(s).
1618
Set Title
Every order
ALL DOCUMENTS
123
Remove this Set Assignment
1620
-- Select Document Set --
Assign
1622
QA Checklist Items
Disable Items
1624
341
1626
Options
QA Description
QA Item Order
Edit | Remove
Did the physician write in a face to face date?
- Did they sign it?
- Is it legible and not a stamp?
1623
1628
Add QA Item
1630
Add
1632

Fig.92



Home
Inbox (18)
Workflows
Clients
My Database
Deleted Items
Document Template Library
Add Document Template
Document Title
1634
Document Templates
Template File
Browse...
No file selected.
1636
1638
Add
= Required Fields
Cancel
156
Add Document Template
Search
Search
Document Title
Show/Hide
Favorite
ADMC Authorization Request Form Region A
Actions

Fig.93

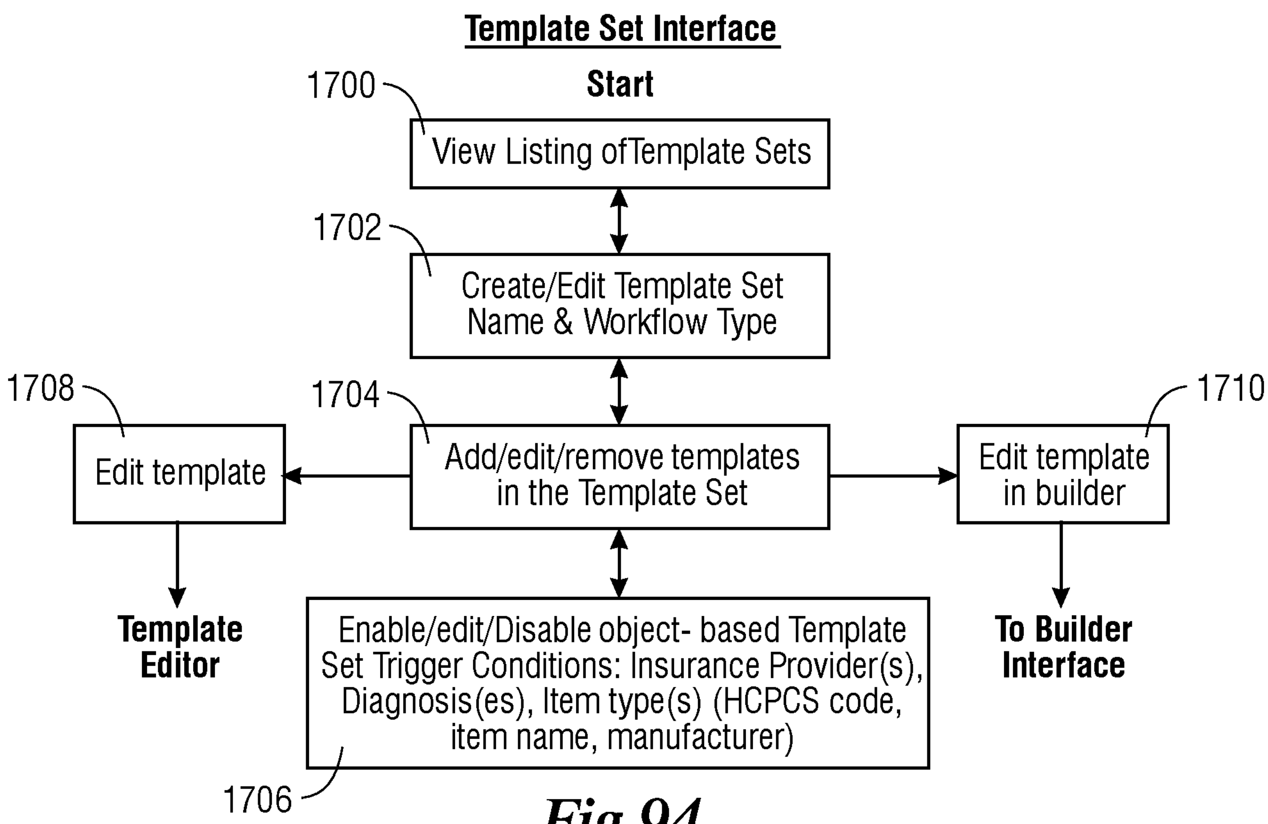

Template Set Interface
Start
1700
View Listing ofTemplate Sets
1702
Create/Edit Template Set Name & Workflow Type
1708
1704
1710
Edit template
Add/edit/remove templates in the Template Set
Edit template in builder
Template Editor
Enable/edit/Disable object- based Template Set Trigger Conditions: Insurance Provider(s), Diagnosis(es), Item type(s) (HCPCS code, item name, manufacturer)
To Builder Interface
1706

Fig.94

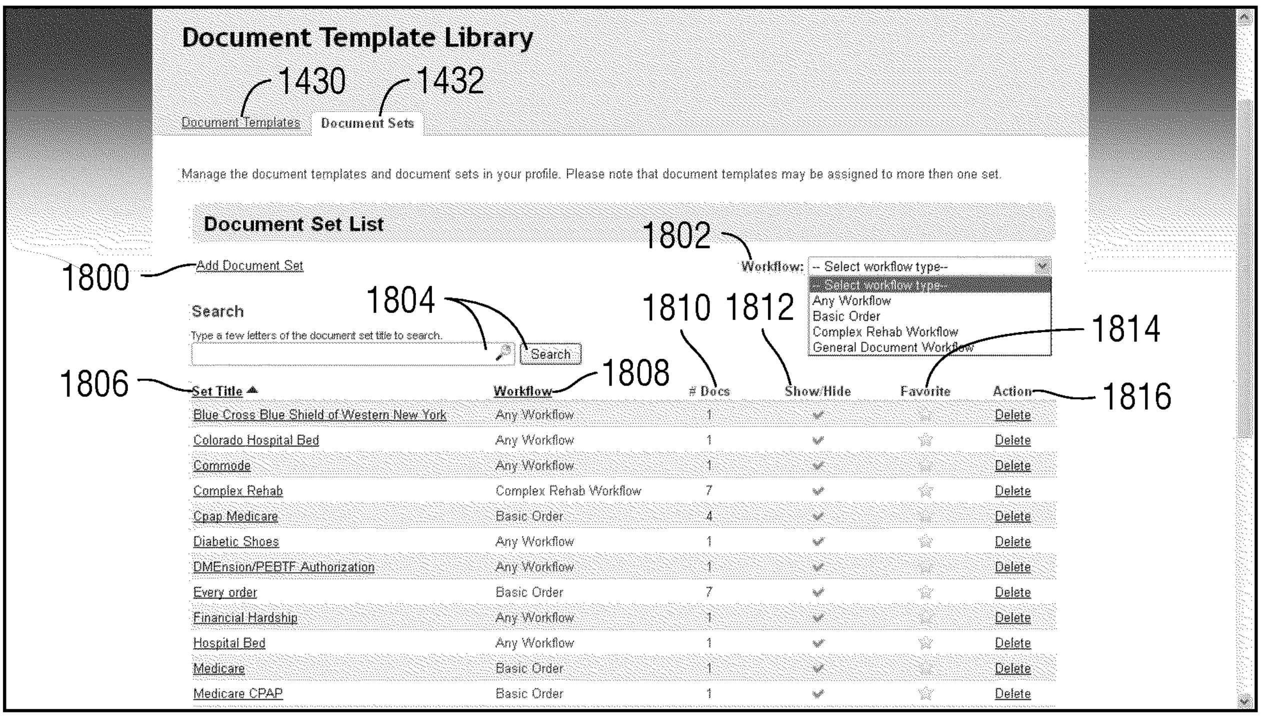
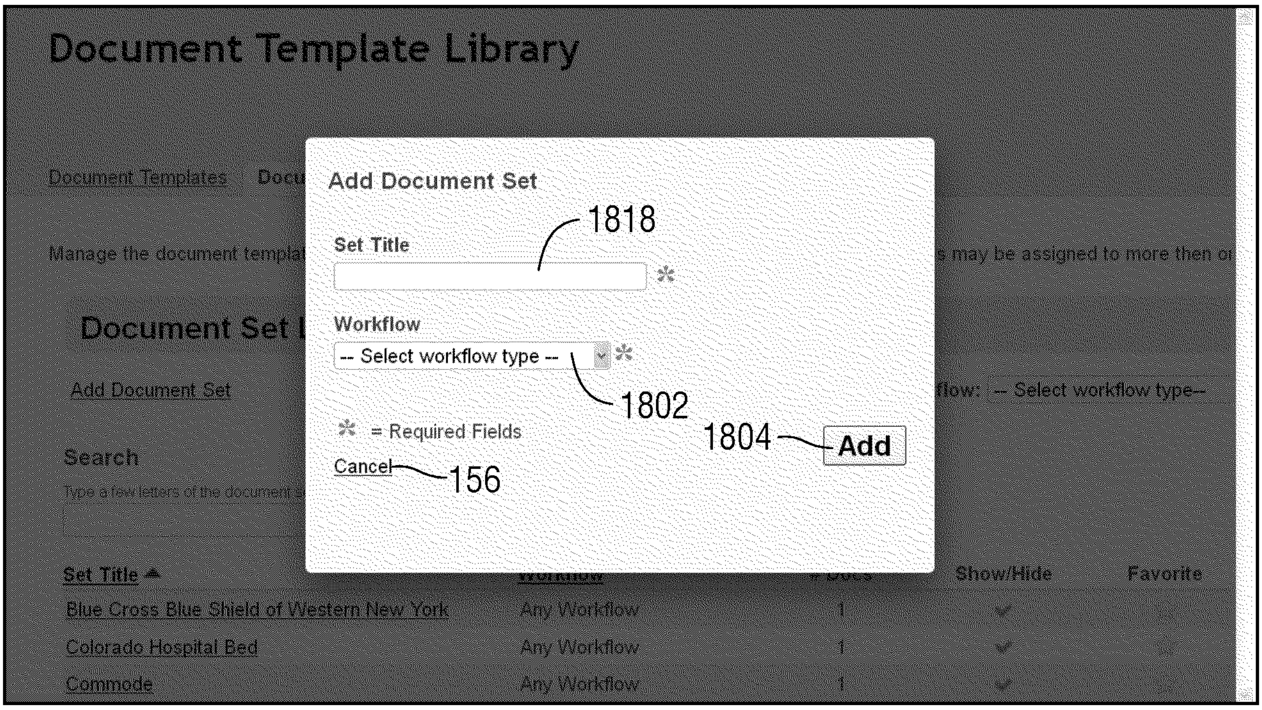
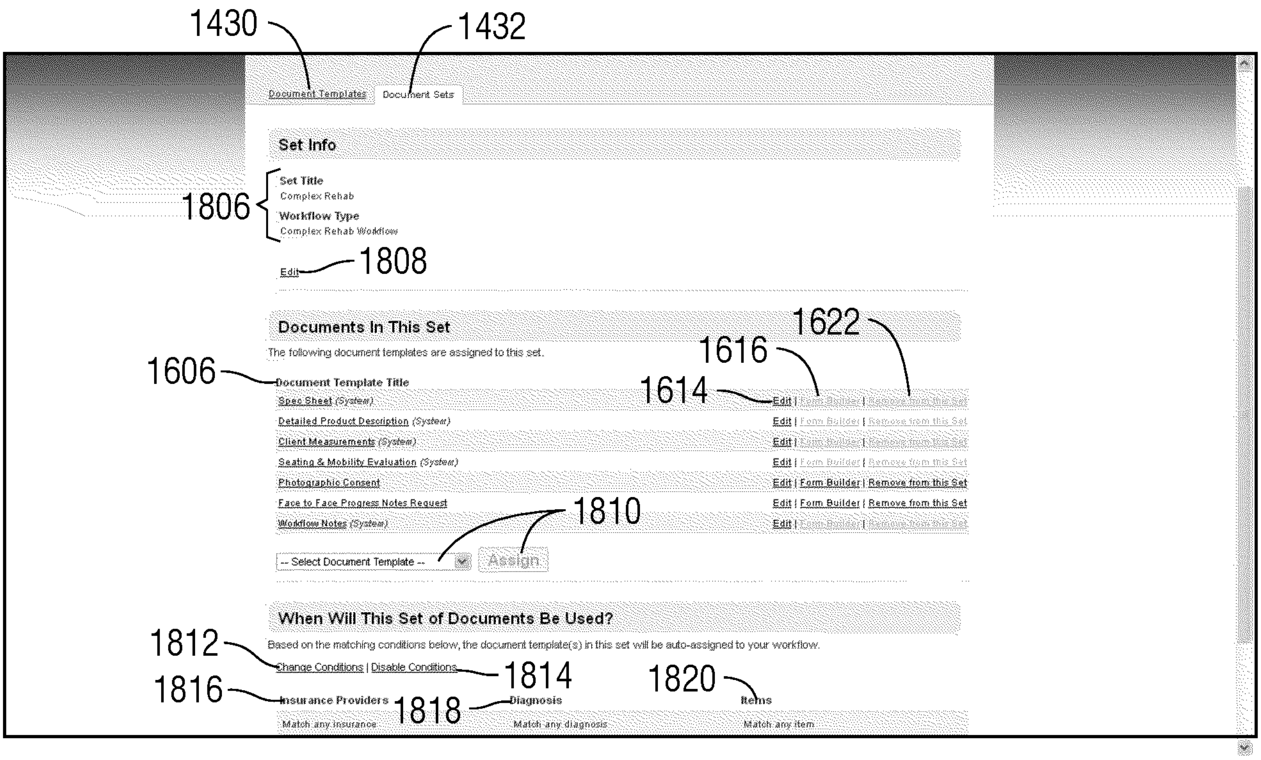

Document Template Library
1430
1432
Document Templates
Document Sets
Manage the document templates and document sets in your profile. Please note that document templates may be assigned to more then one set.
Document Set List
1802
1800
Add Document Set
Workflow:
-- Select workflow type--
Any Workflow
Basic Order
Complex Rehab Workflow
General Document Workflow
Search
1804
1810
1812
1814
Type a few letters of the document set title to search.
Search
1806
1808
Set Title
Workflow
Docs
Show/Hide
Favorite
Action
1816
Blue Cross Blue Shield of Western New York
Any Workflow
1
Delete
Colorado Hospital Bed
Commode
Complex Rehab
Complex Rehab Workflow
7
Cpap Medicare
Basic Order
4
Diabetic Shoes
DMEnsion/PEBTF Authorization
Every order
Financial Hardship
Hospital Bed
Medicare
Medicare CPAP

Fig.95



Document Template Library
Document Templates
Manage the document templat
Document Set
Add Document Set
Search
Add Document Set
Set Title
1818
Workflow
-- Select workflow type --
1802
1804
Add
= Required Fields
Cancel
156
flow: -- Select workflow type--
Set Title
Show/Hide
Favorite
Blue Cross Blue Shield of Western New York
Any Workflow
Colorado Hospital Bed
Any Workflow
Commode
Any Workflow

Fig.96



1430
1432
Document Templates
Document Sets
Set Info
1806
Set Title
Complex Rehab
Workflow Type
Complex Rehab Workflow
Edit
1808
Documents In This Set
The following document templates are assigned to this set.
1606
Document Template Title
1622
1616
1614
Spec Sheet (System)
Detailed Product Description (System)
Client Measurements (System)
Seating & Mobility Evaluation (System)
Photographic Consent
Face to Face Progress Notes Request
Workflow Notes (System)
Edit | Form Builder | Remove from this Set
1810
-- Select Document Template --
Assign
When Will This Set of Documents Be Used?
Based on the matching conditions below, the document template(s) in this set will be auto-assigned to your workflow.
1812
Change Conditions | Disable Conditions
1814
1816
Insurance Providers
1818
Diagnosis
1820
Items
Match any insurance
Match any diagnosis
Match any item

Fig.97

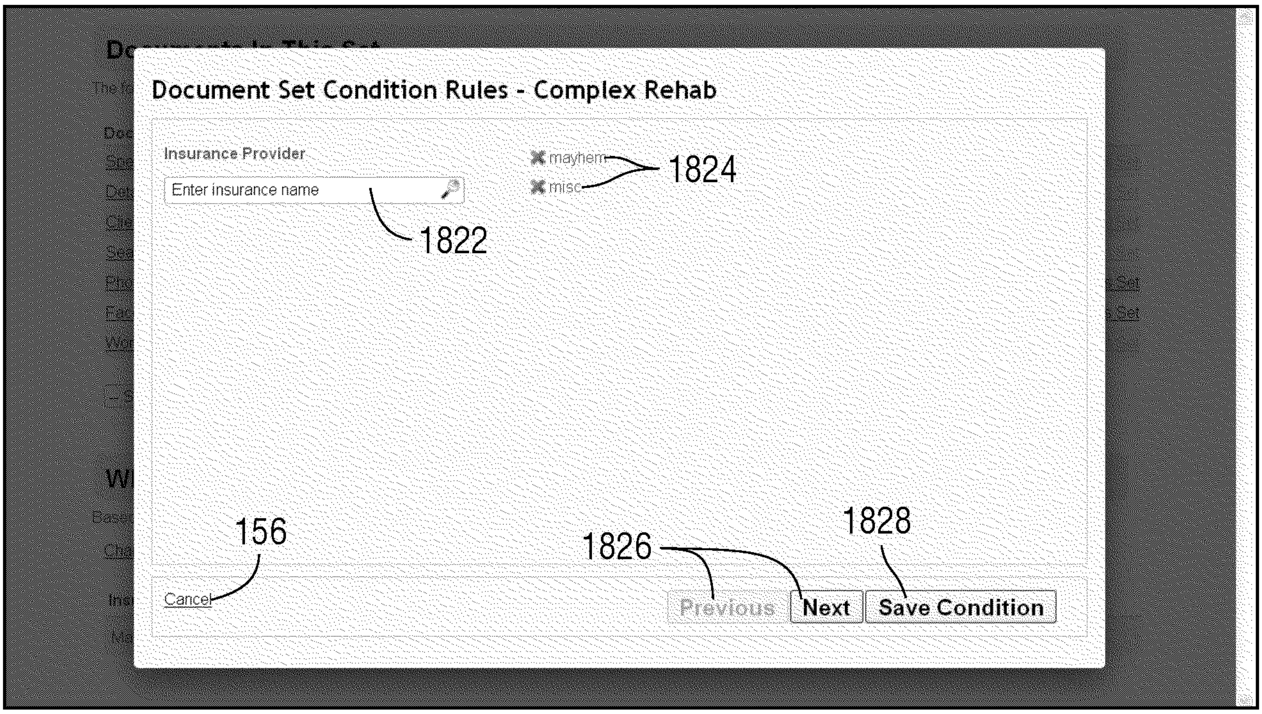

Document Set Condition Rules - Complex Rehab
Insurance Provider
Enter insurance name
mayhem
misc
1824
1822
156
1826
1828
Cancel
Previous
Next
Save Condition

Fig.98

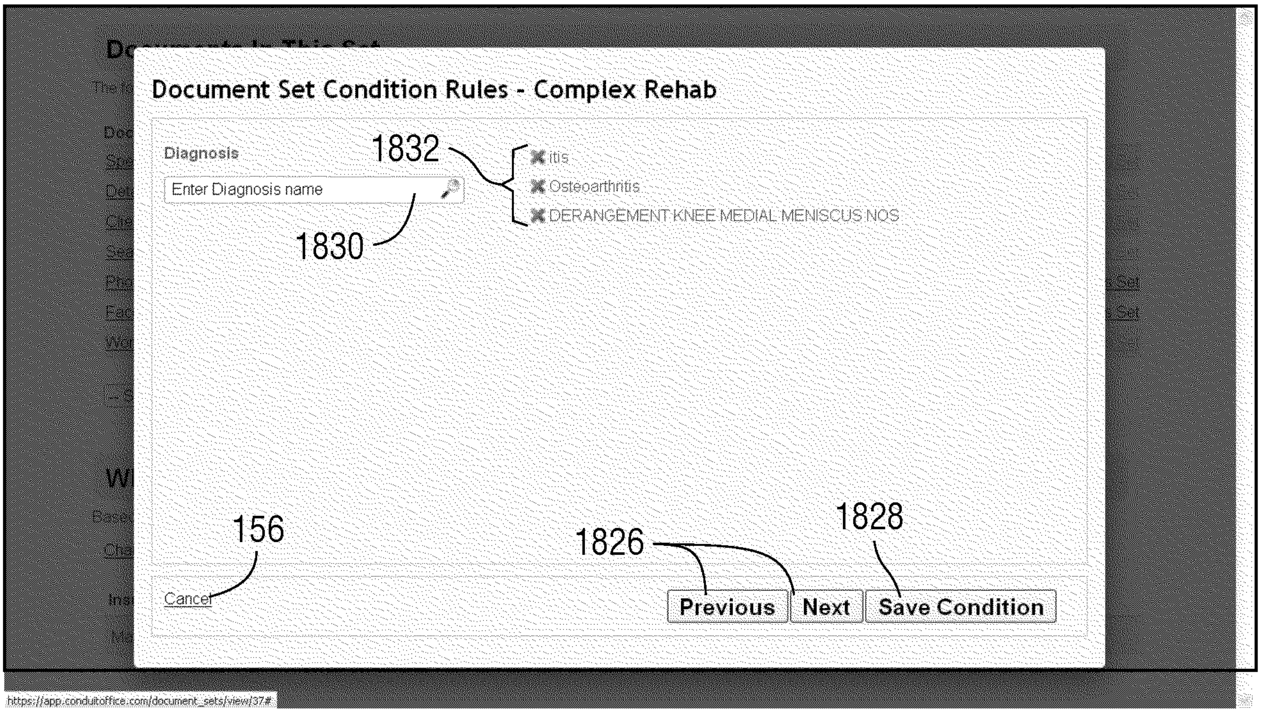
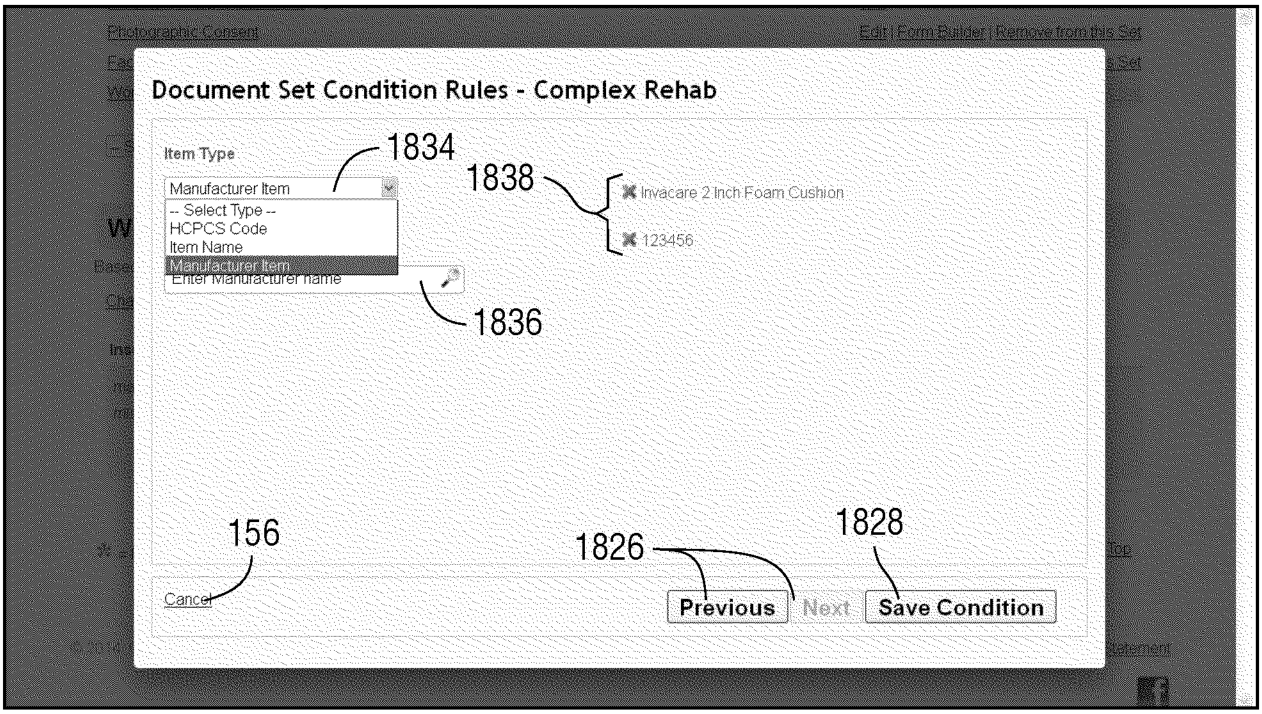

Document Set Condition Rules - Complex Rehab
Diagnosis
1832
Enter Diagnosis name
itis
Osteoarthritis
DERANGEMENT KNEE MEDIAL MENISCUS NOS
1830
156
1826
1828
Cancel
Previous
Next
Save Condition
https://app.conduitoffice.com/document_sets/view/37#

Fig.99



Document Set Condition Rules - Complex Rehab
Item Type
Manufacturer Item
-- Select Type --
HCPCS Code
Item Name
Manufacturer Item
Enter Manufacturer name
Invacare 2 Inch Foam Cushion
123456
Cancel
Previous
Next
Save Condition
1834
1838
1836
156
1826
1828

Fig.100

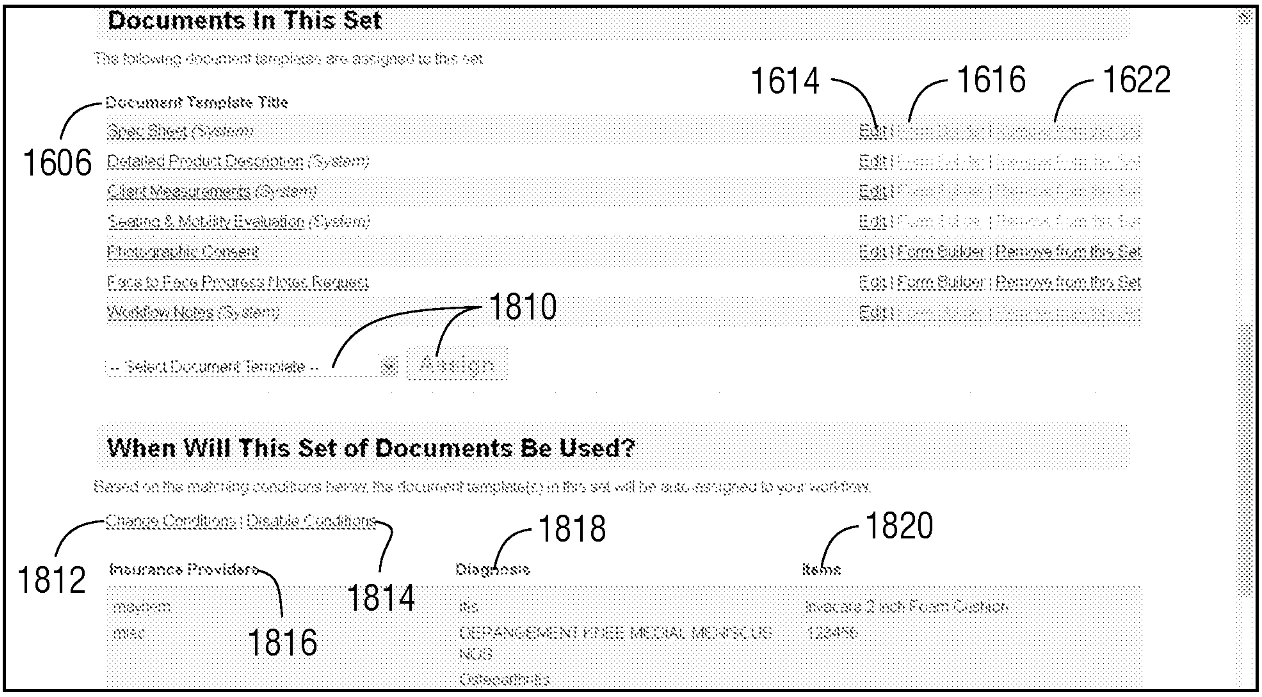


Fig.101

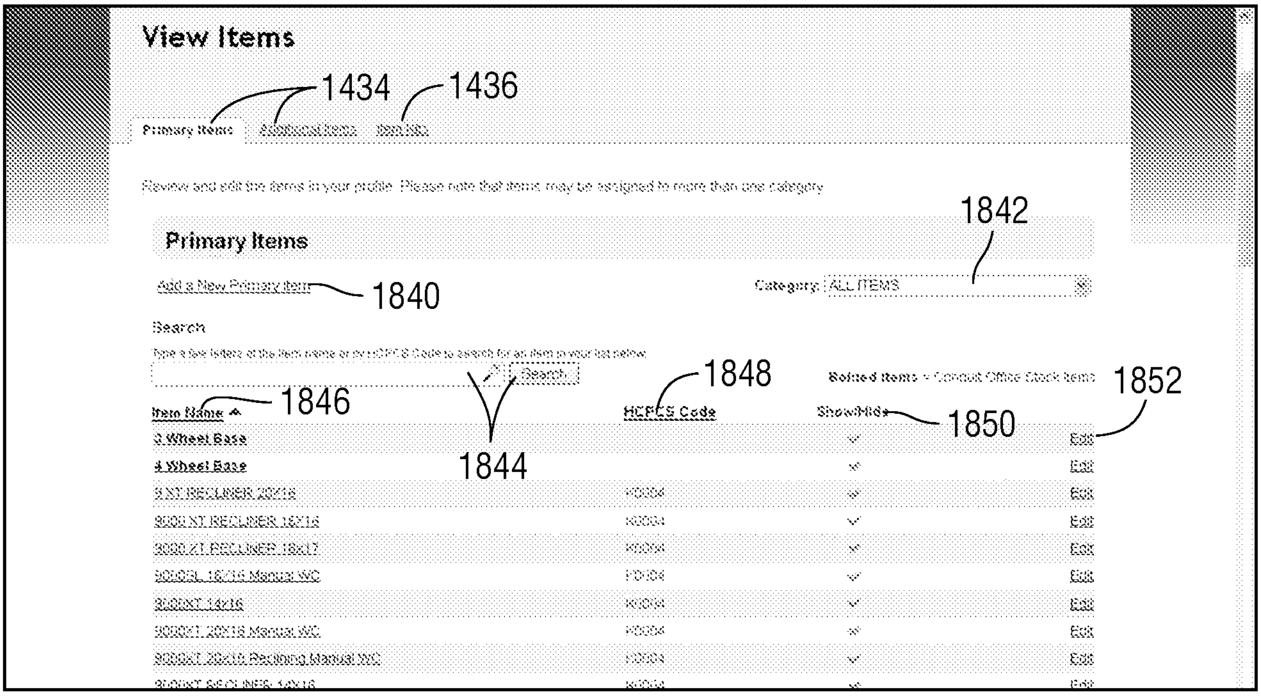


Fig.102

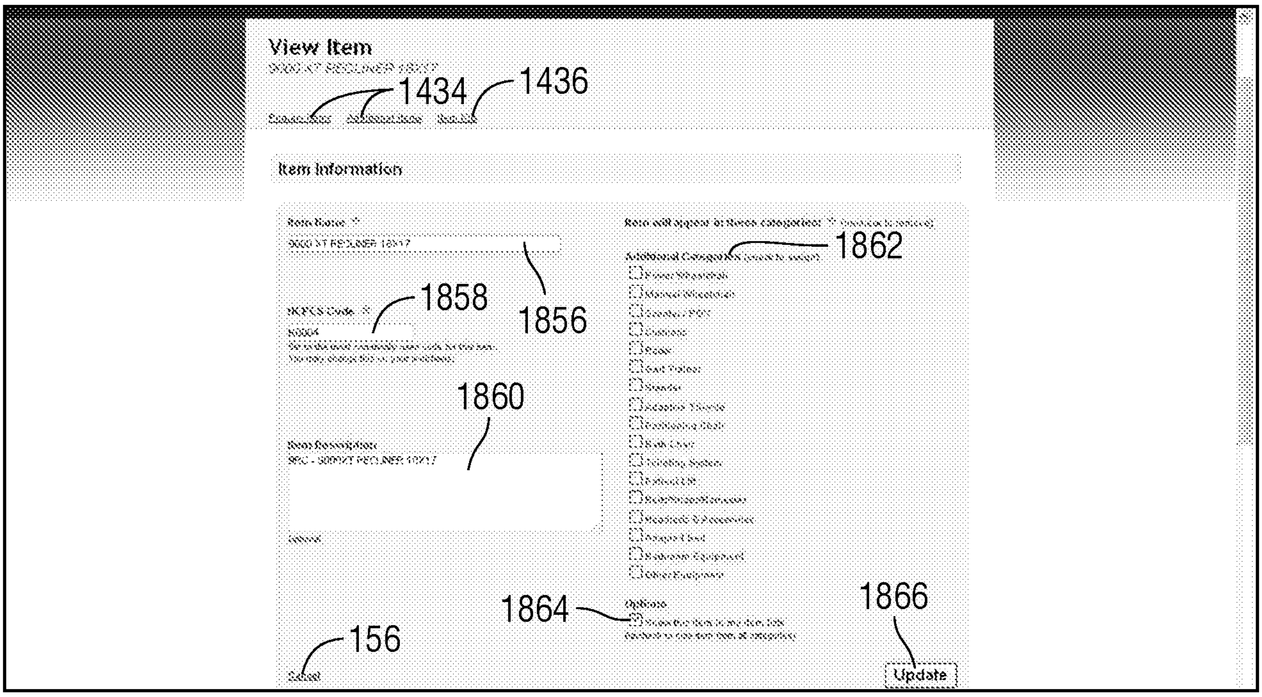


Fig.103

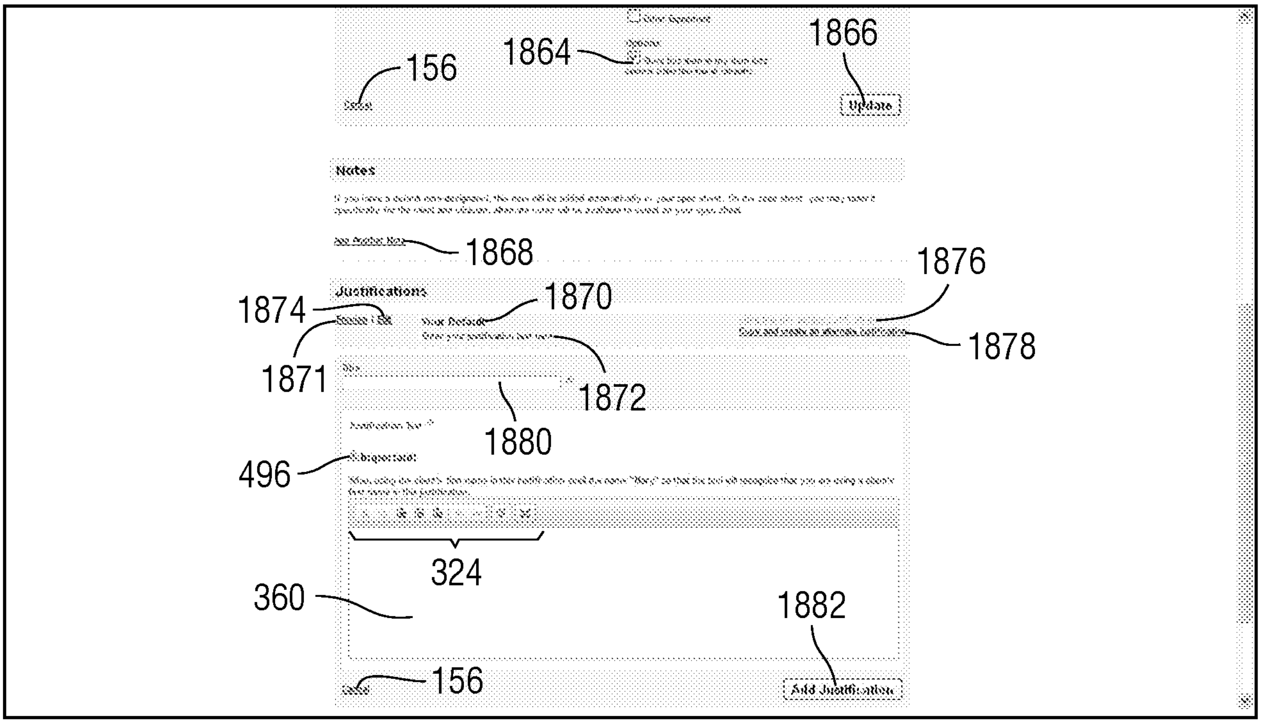


Fig.104

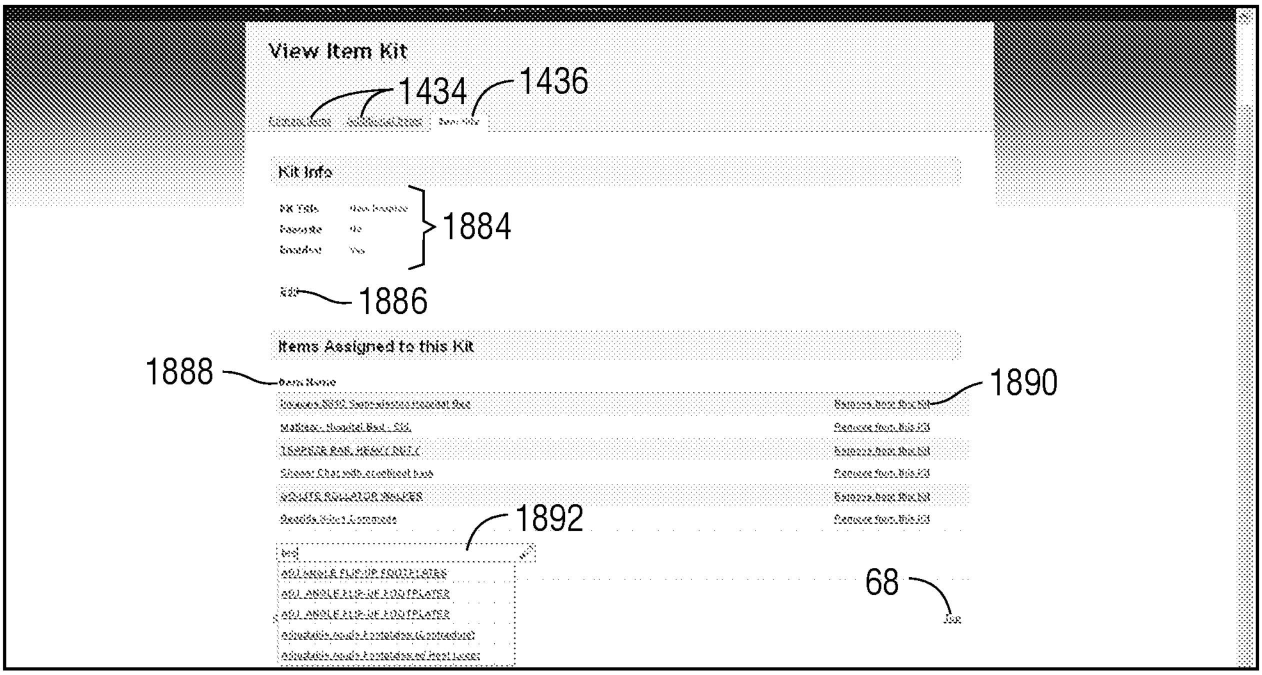


Fig.105

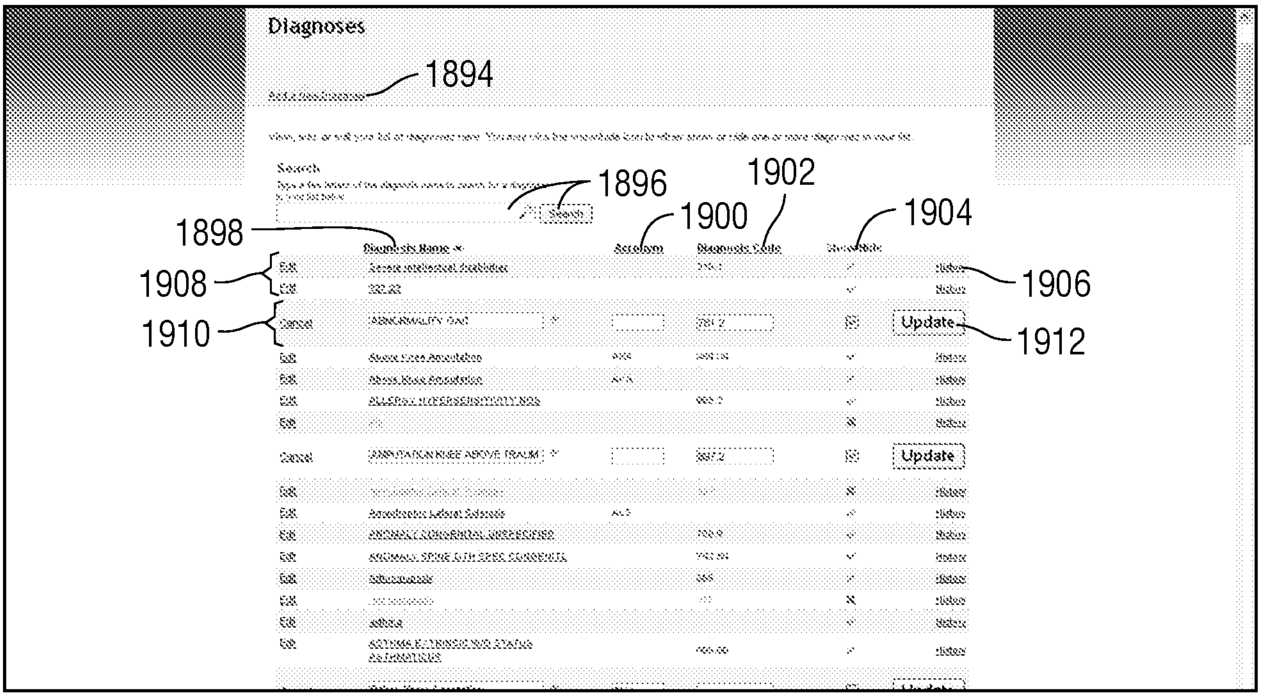


Fig.106

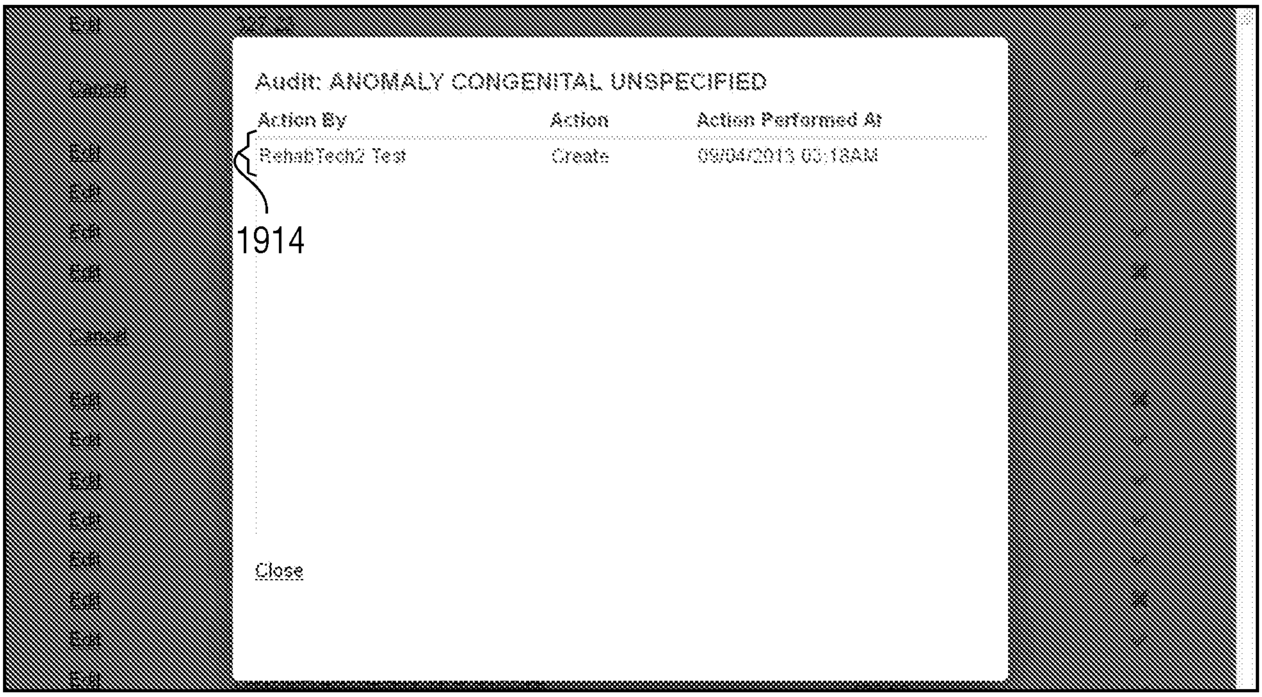


Fig.107

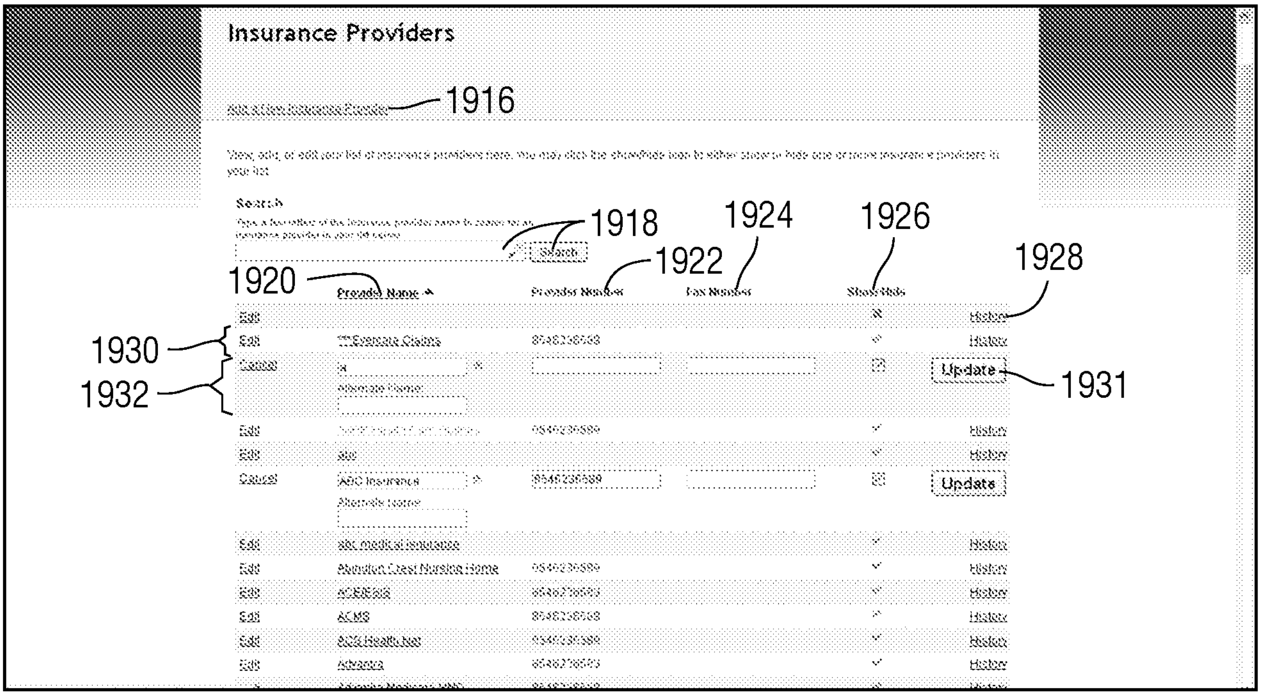


Fig.108

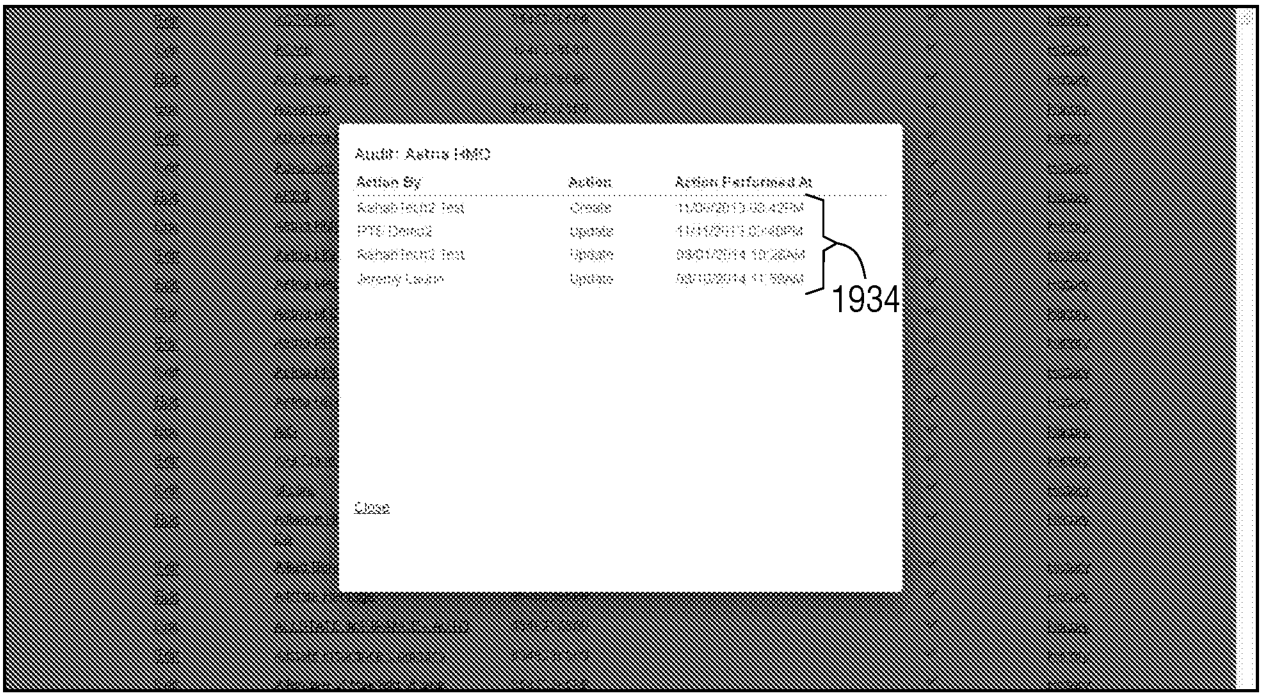


Fig.109

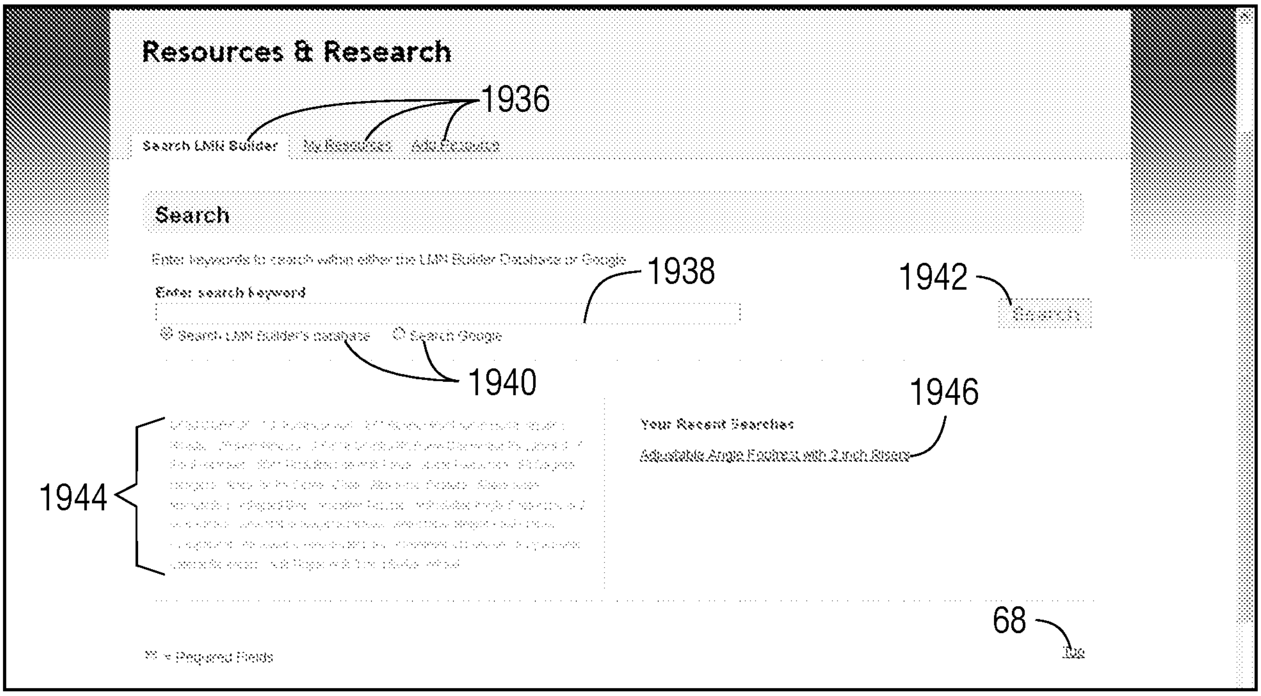


Fig.110

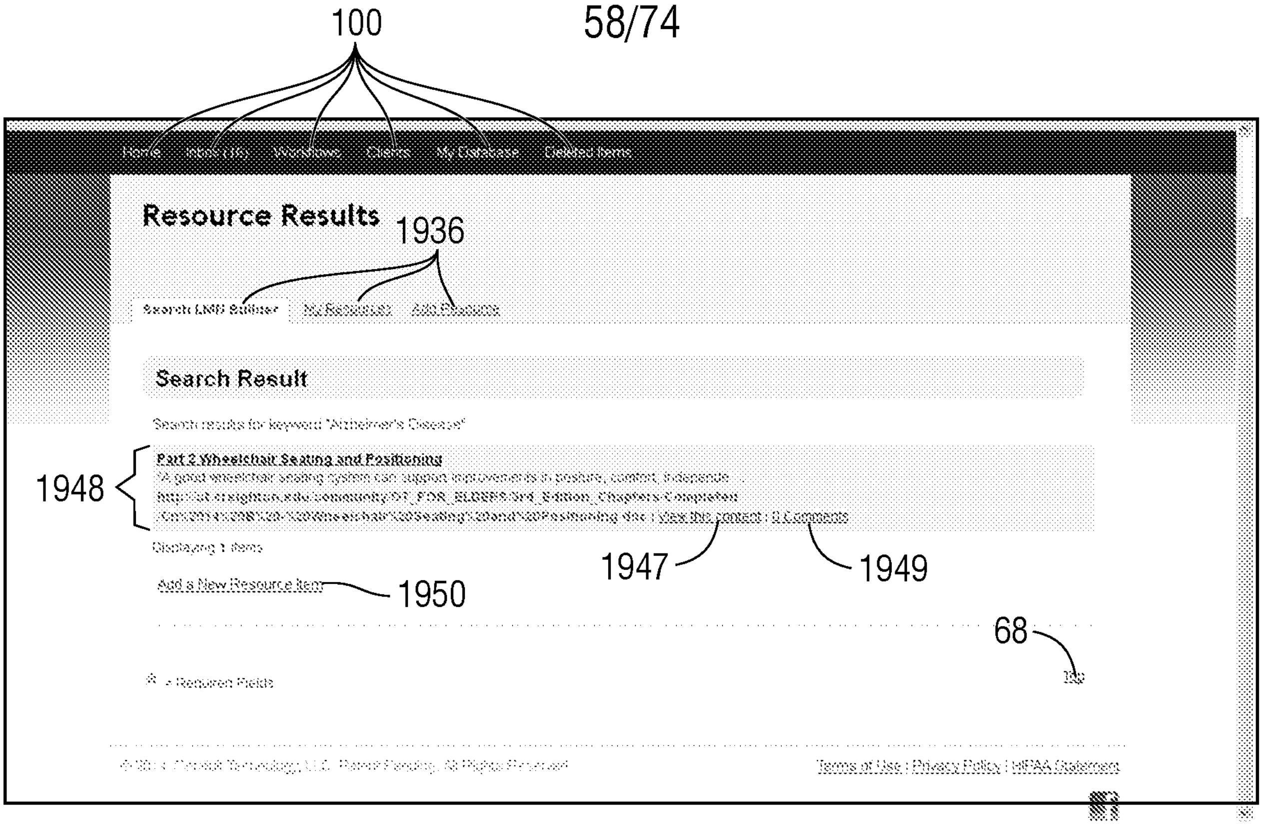


Fig.111

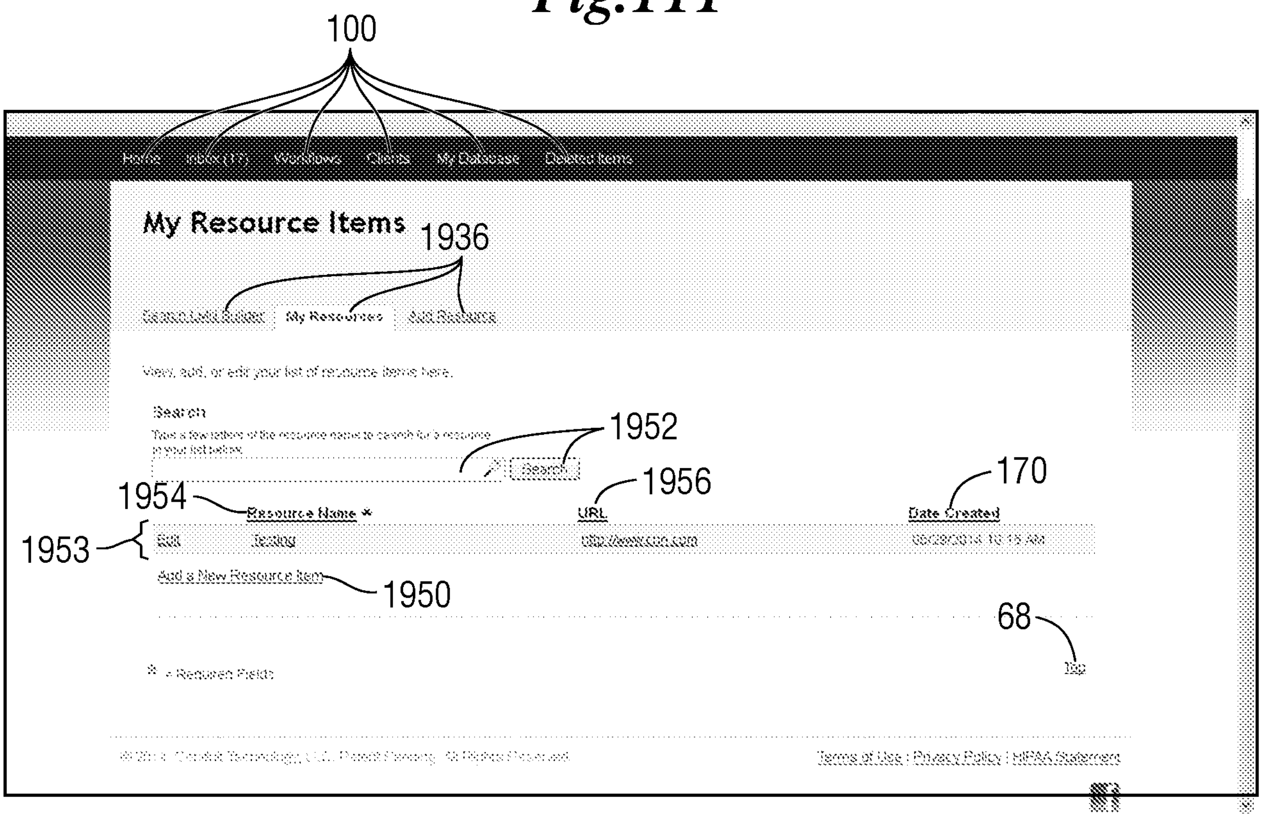


Fig.112

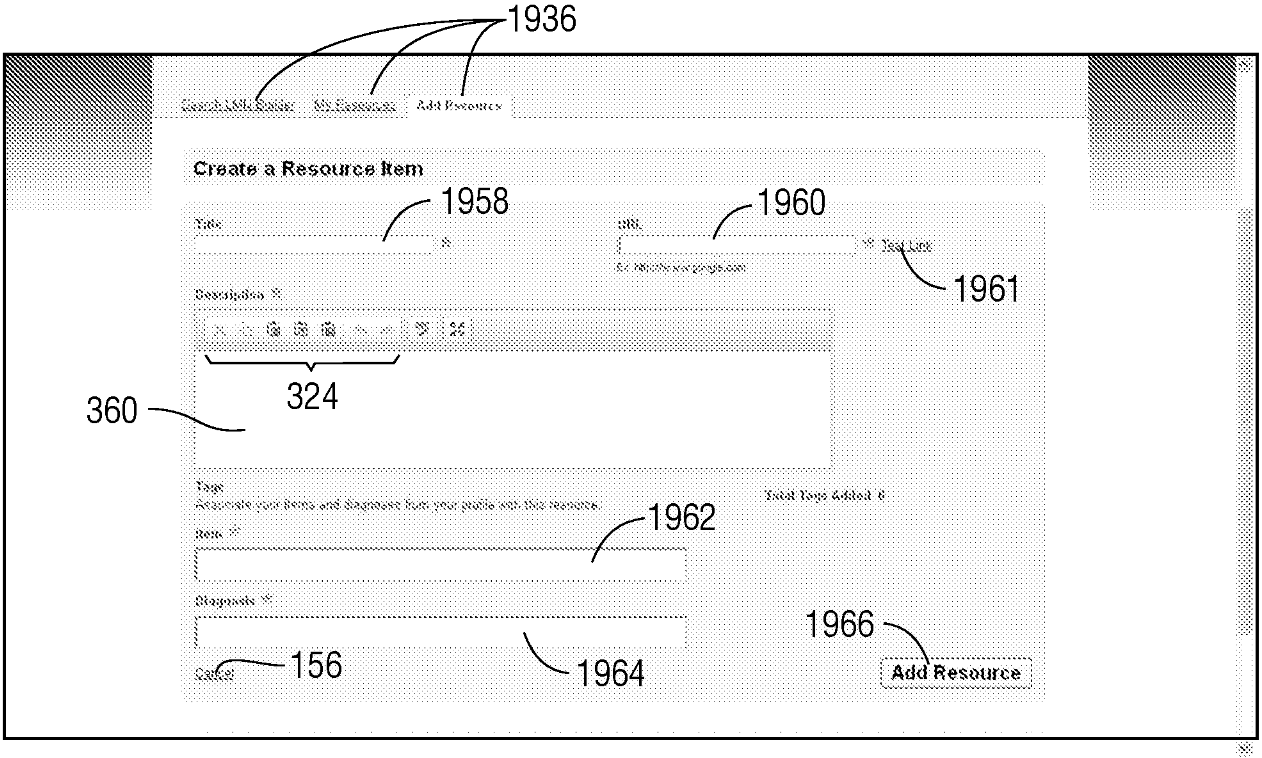


Fig.113

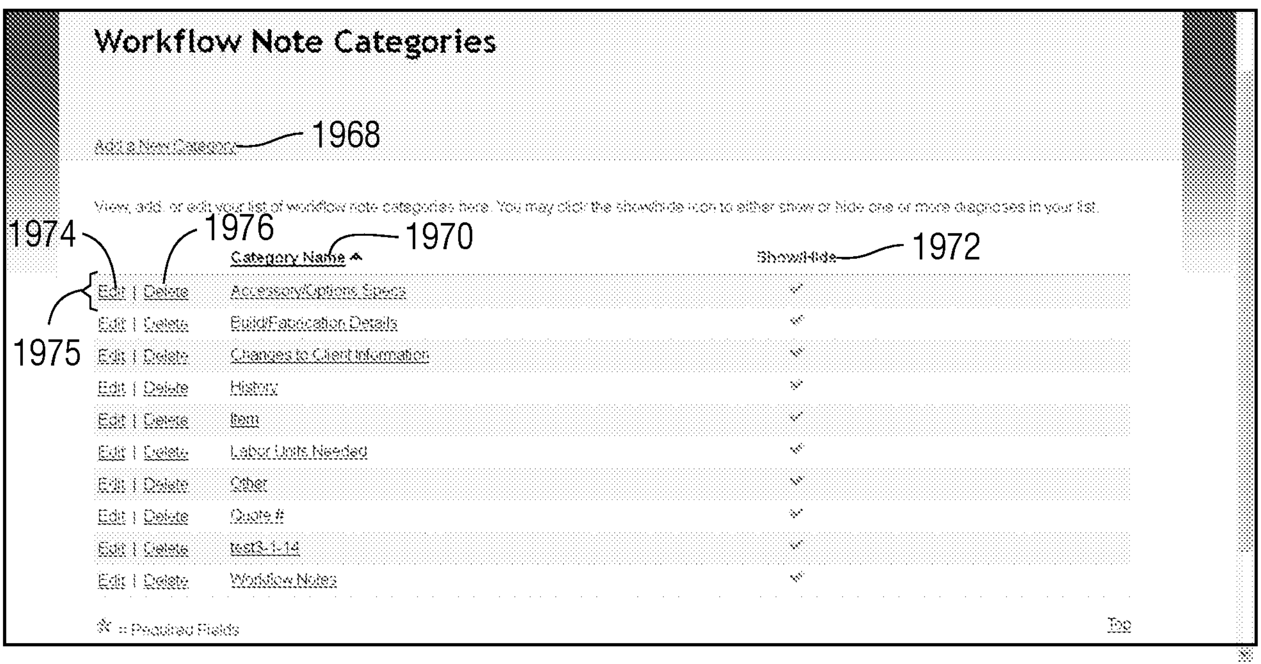


Fig.114

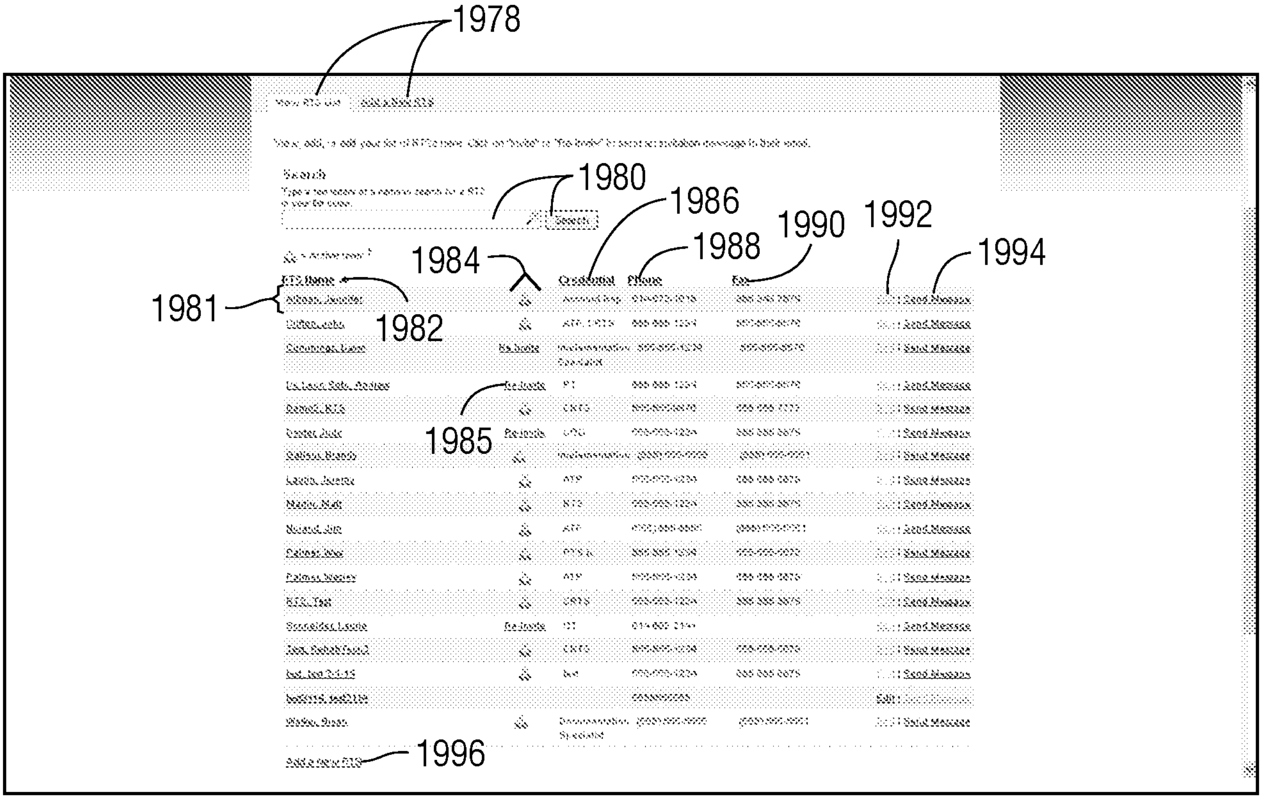


Fig.115

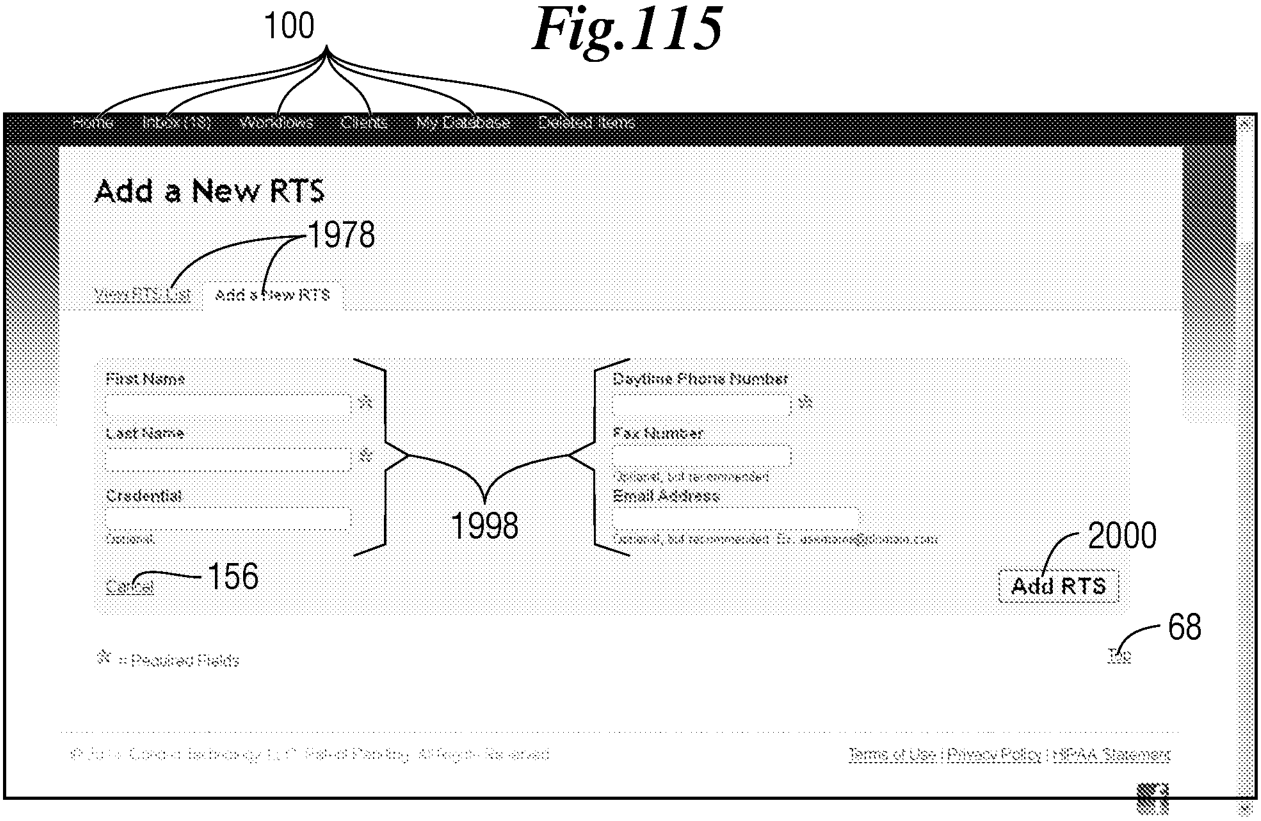


Fig.116

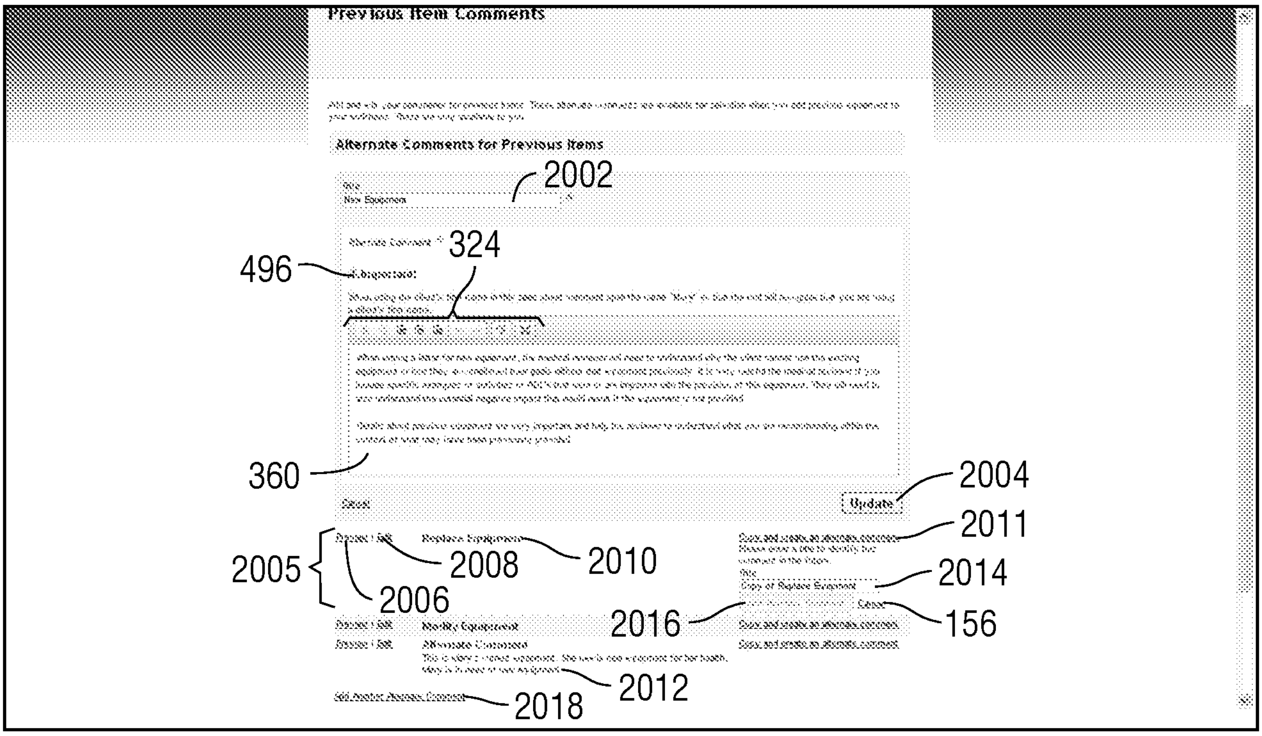


Fig.117

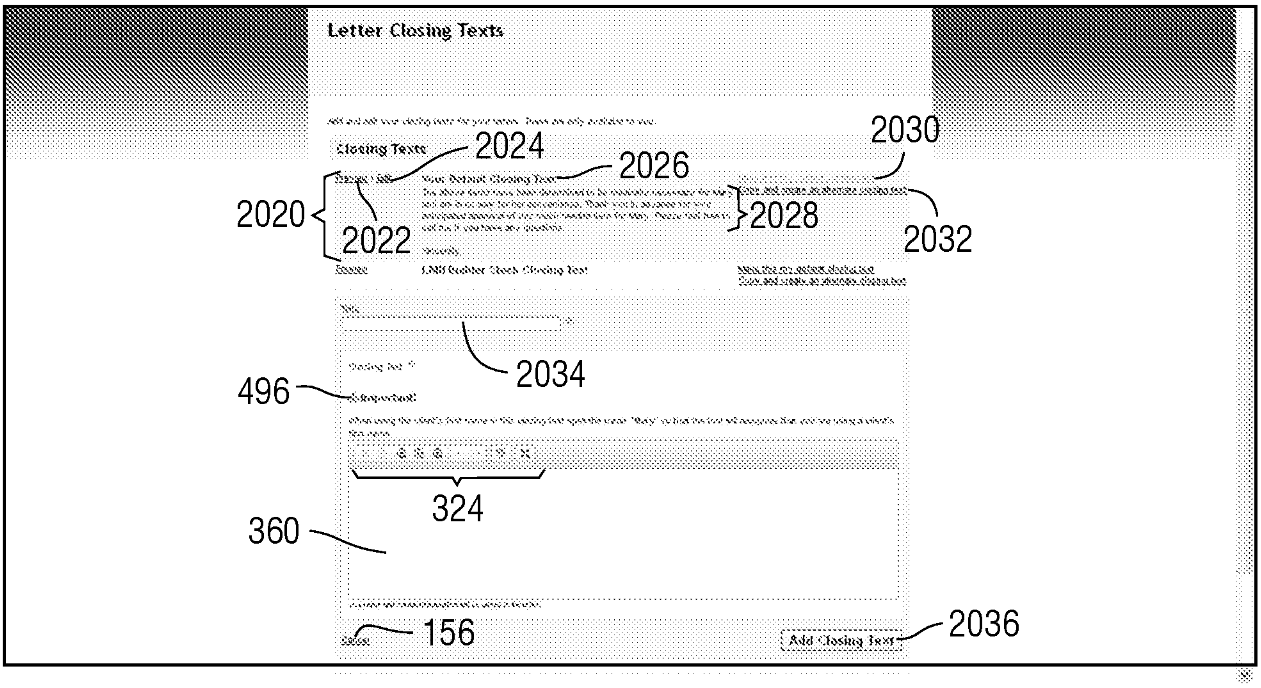


Fig.118

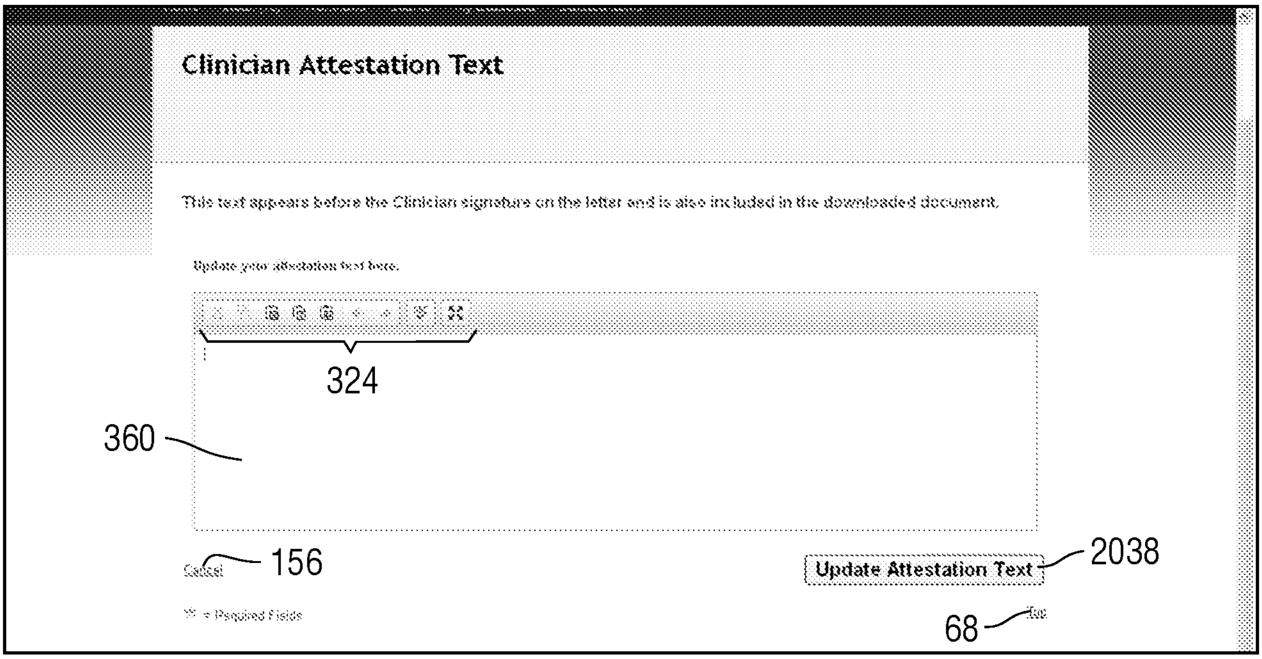


Fig.119

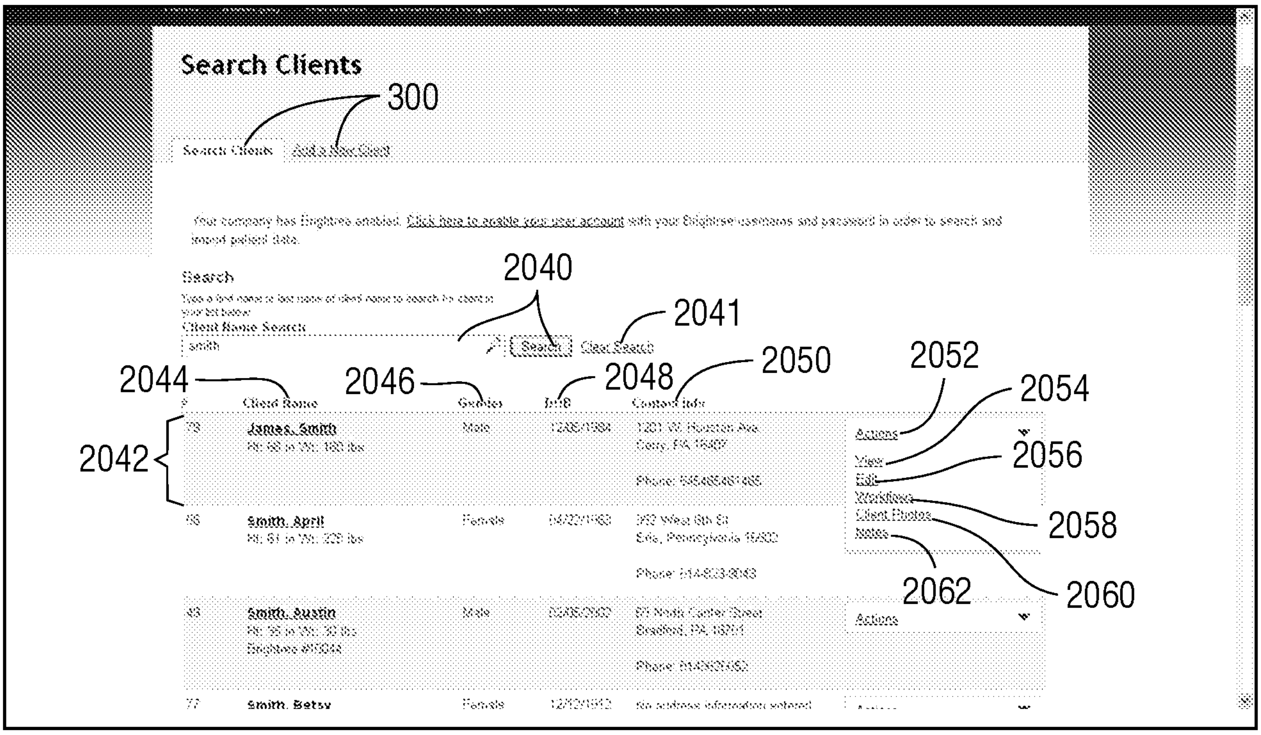


Fig.120

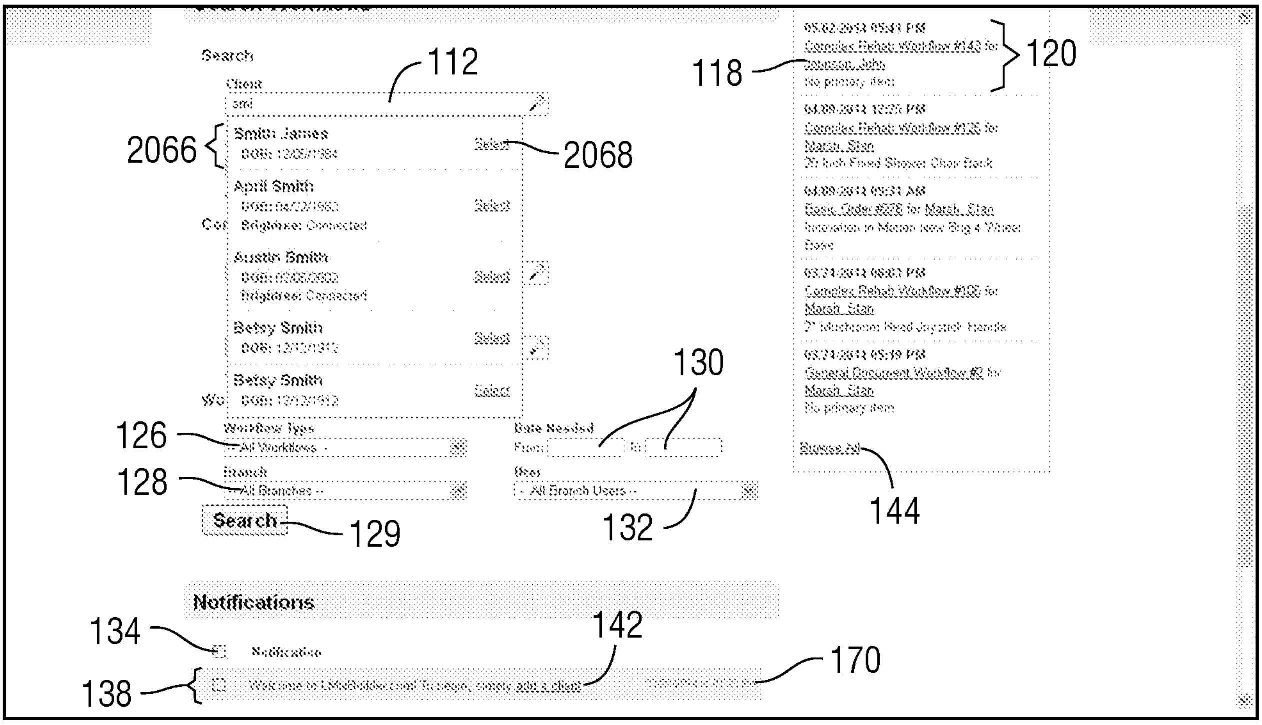


Fig.121

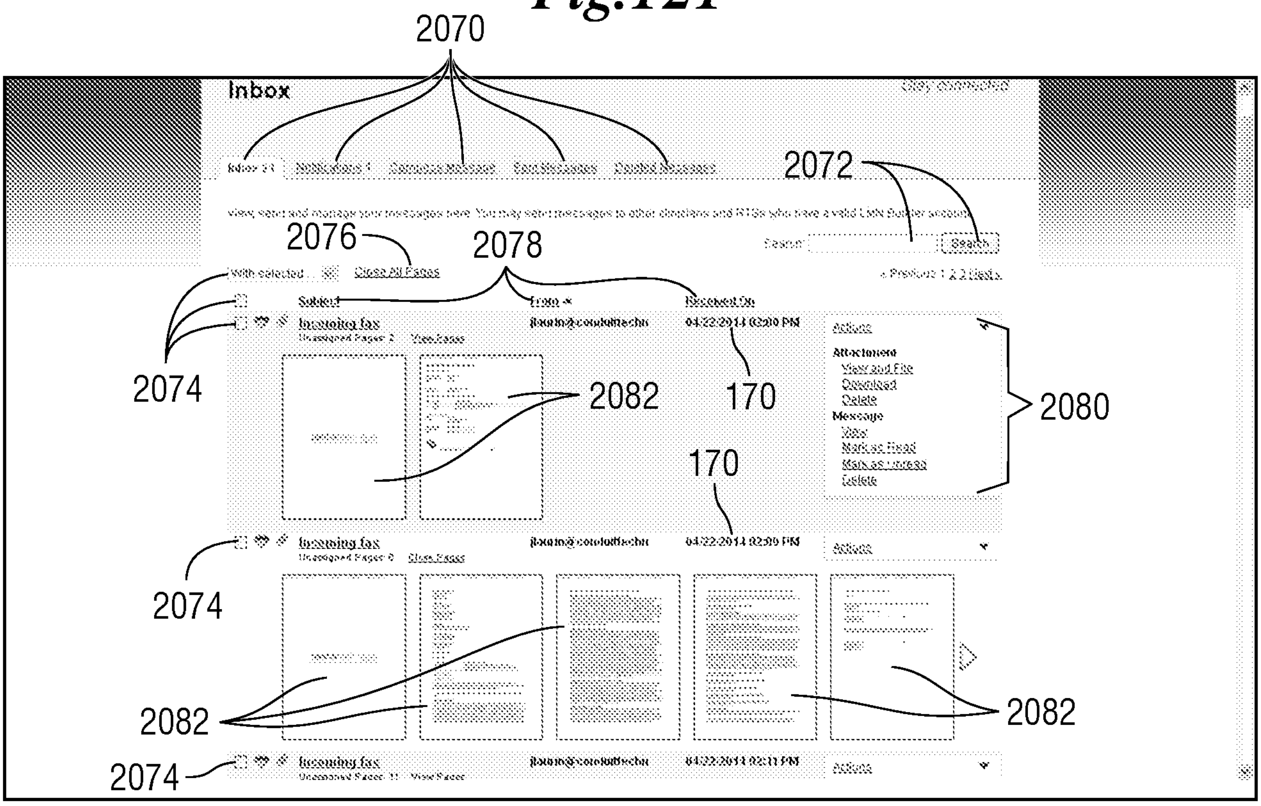


Fig.122

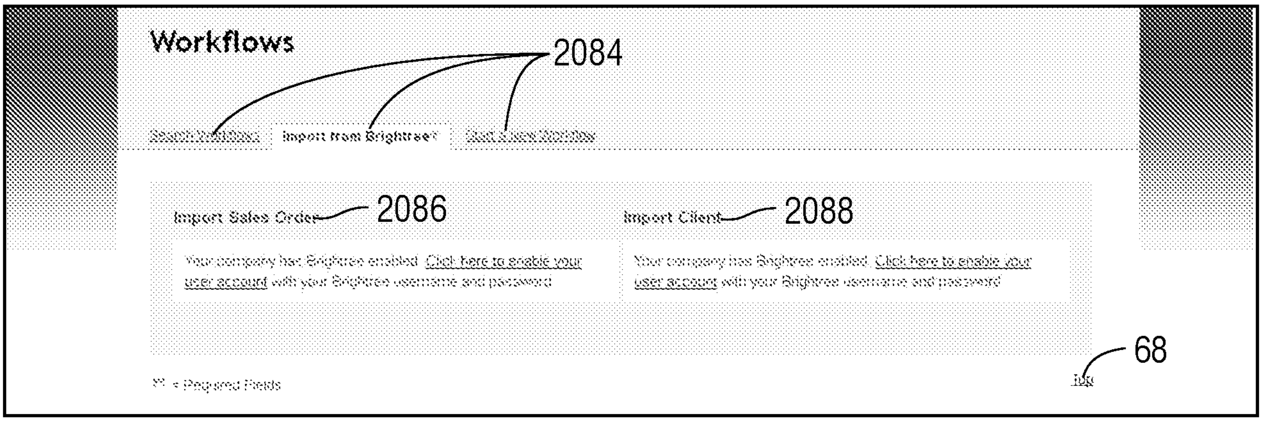

Workflows
2084
Import from Brightree
Import Sales Order
2086
Import Client
2088
Your company has Brightree enabled. Click here to enable your user account with your Brightree username and password
Your company has Brightree enabled. Click here to enable your user account with your Brightree username and password
68

Fig.123

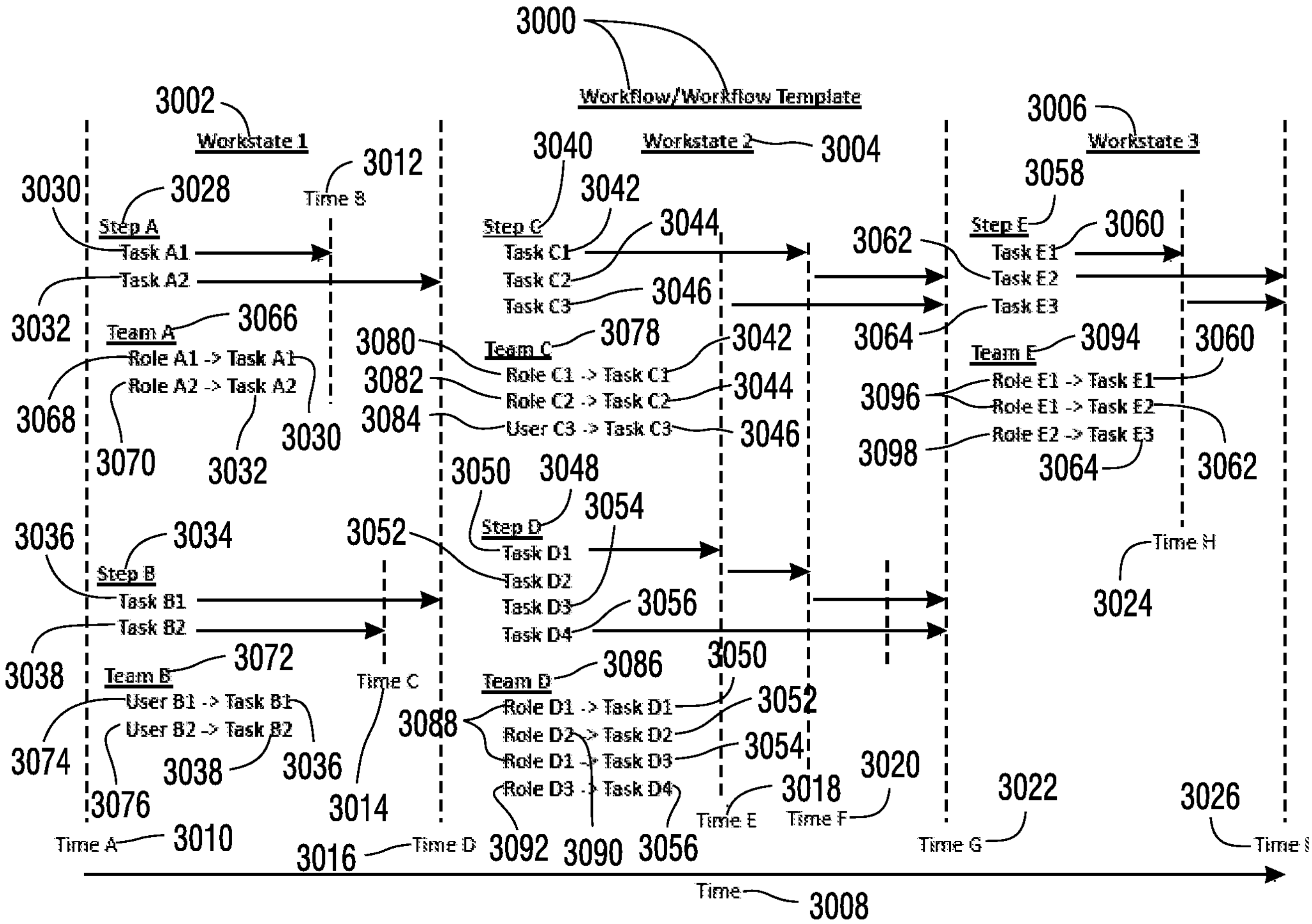

3000
Workflow/Workflow Template
3002
Workstate 1
Workstate 2
3004
3006
Workstate 3
Step A
Task A1
Task A2
Team A
Role A1 -> Task A1
Role A2 -> Task A2
Step B
Task B1
Task B2
Team B
User B1 -> Task B1
User B2 -> Task B2
Step C
Task C1
Task C2
Task C3
Team C
Role C1 -> Task C1
Role C2 -> Task C2
User C3 -> Task C3
Step D
Task D1
Task D2
Task D3
Task D4
Team D
Role D1 -> Task D1
Role D2 -> Task D2
Role D1 -> Task D3
Role D3 -> Task D4
Step E
Task E1
Task E2
Task E3
Team E
Role E1 -> Task E1
Role E1 -> Task E2
Role E2 -> Task E3
Time A
Time B
Time C
Time D
Time E
Time F
Time G
Time H
Time
3008

Fig.124

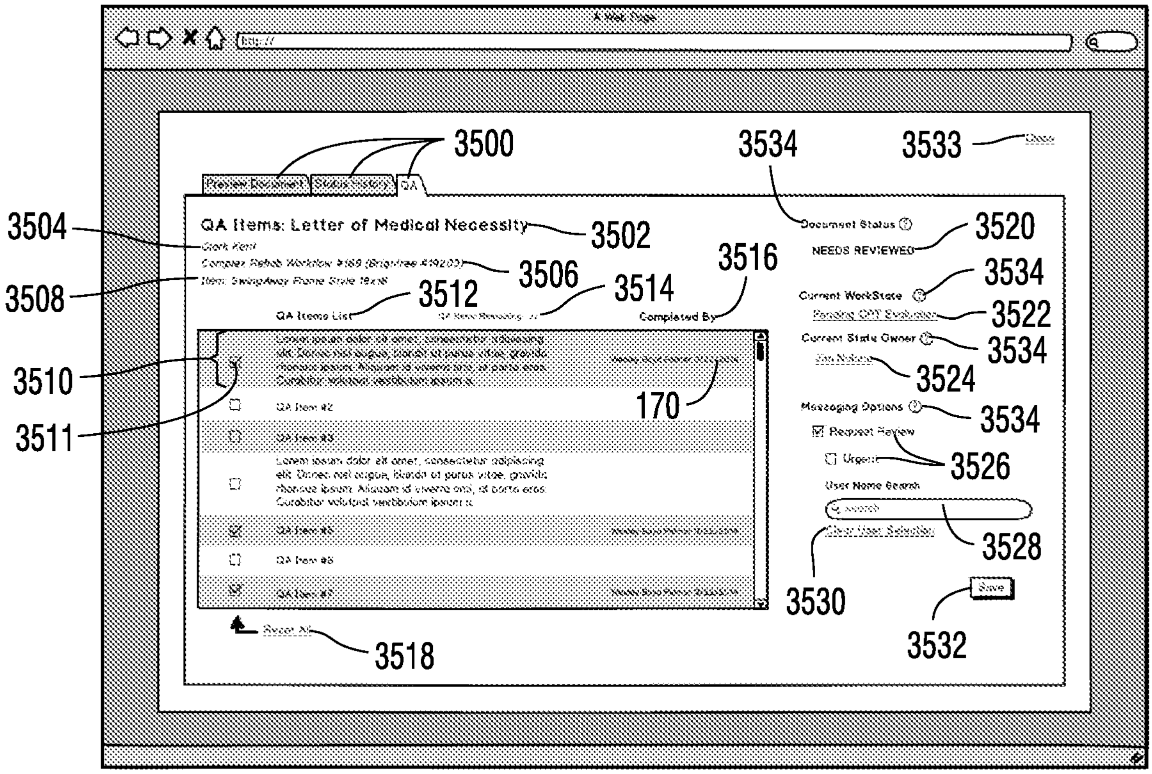


Fig.125

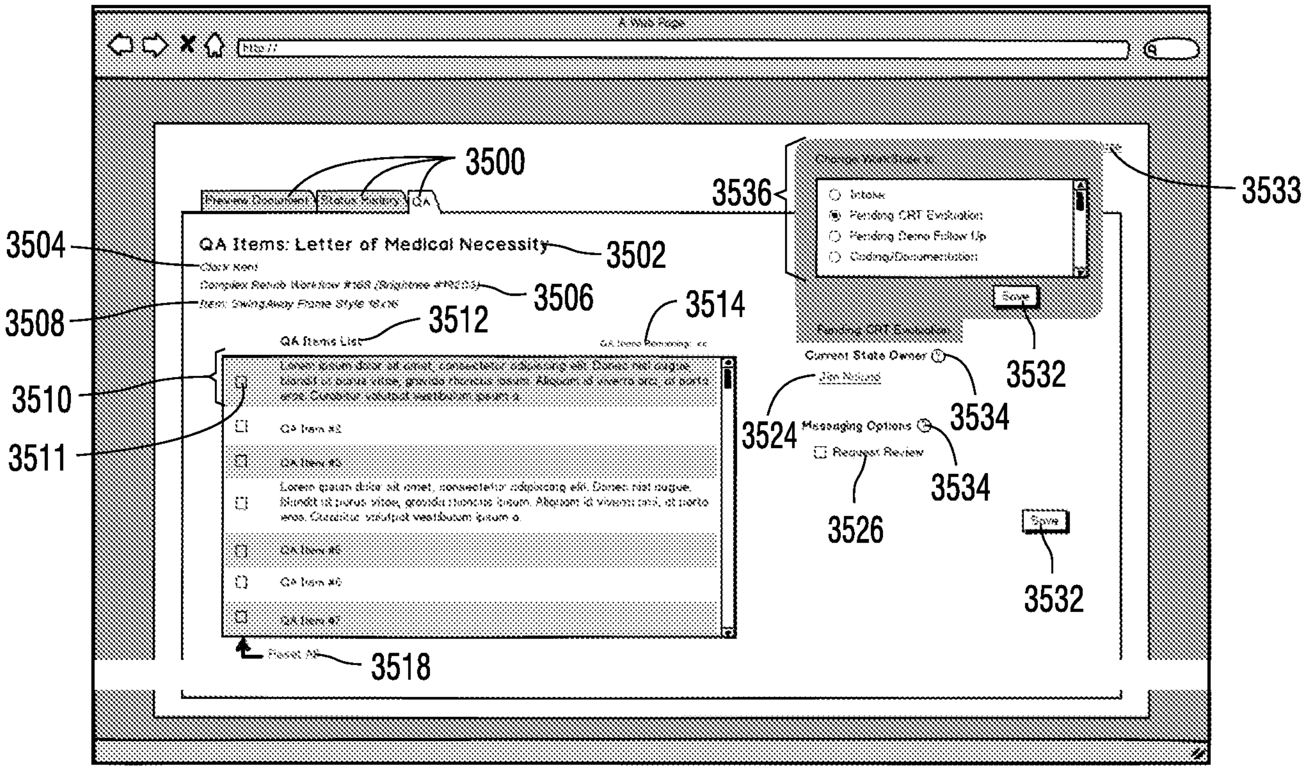


Fig.126

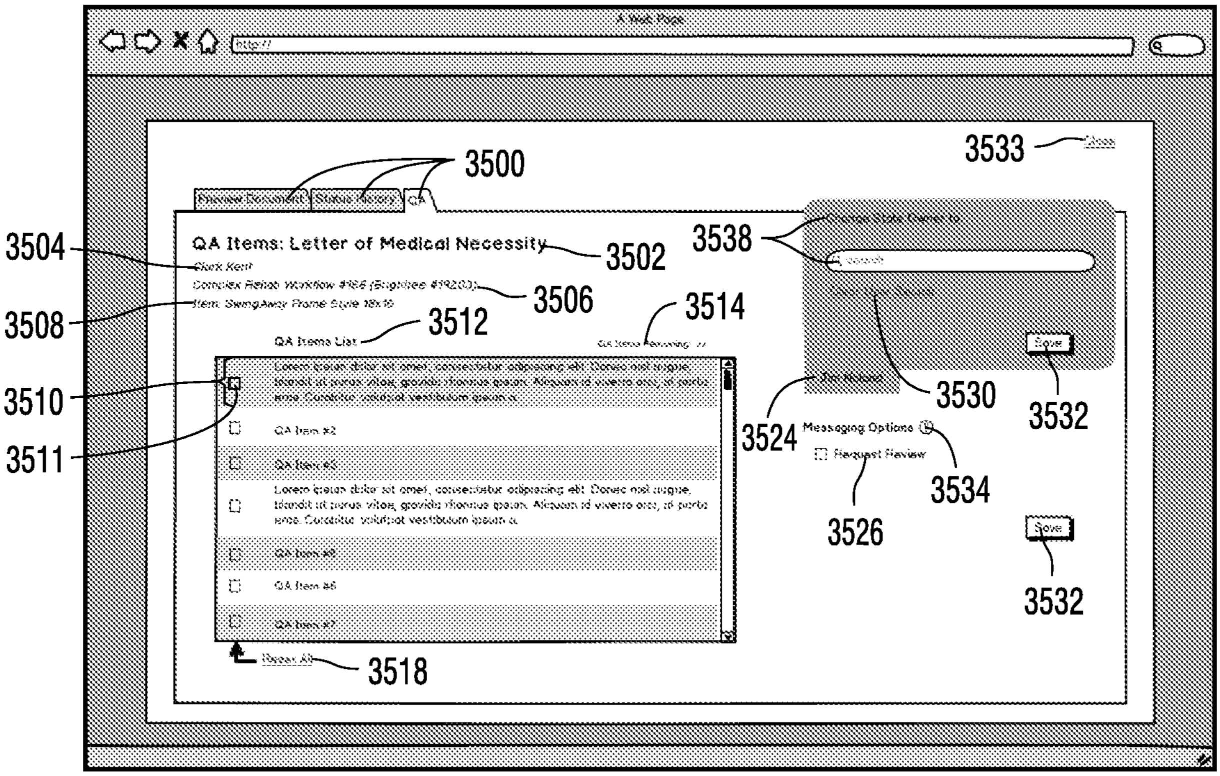


Fig.127

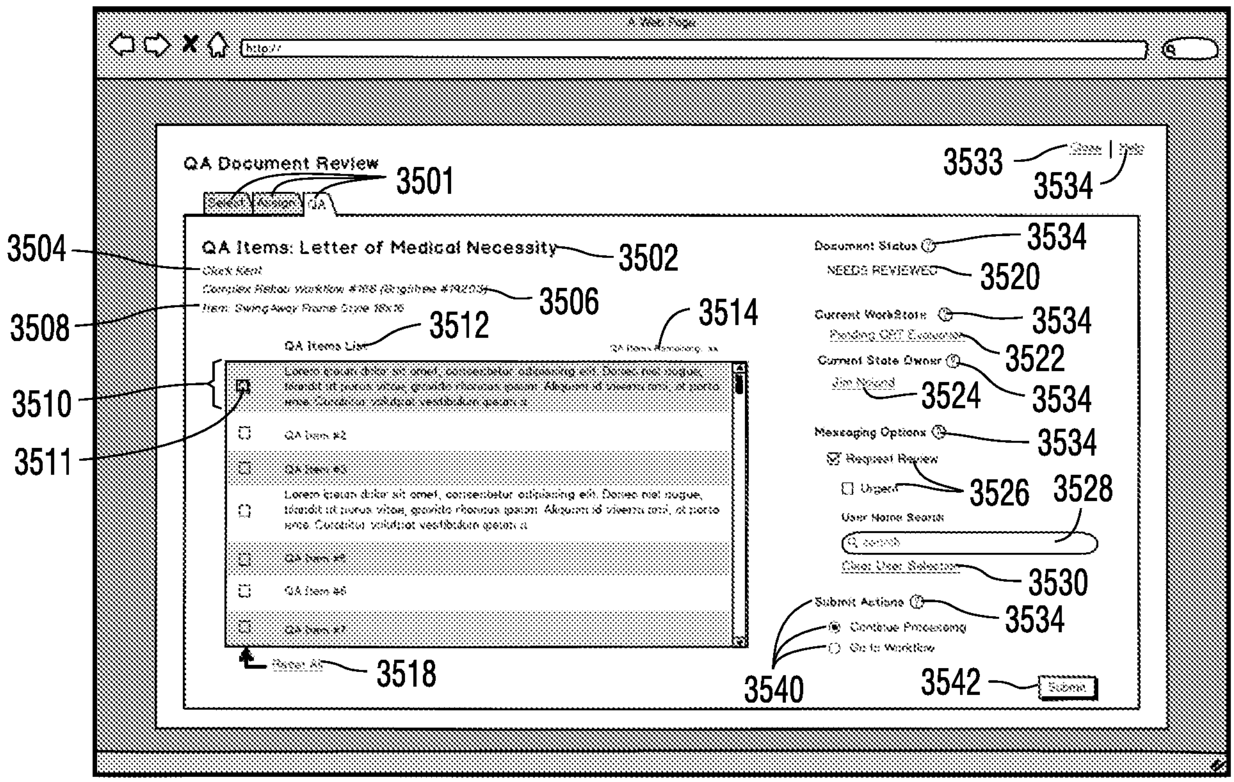


Fig.128

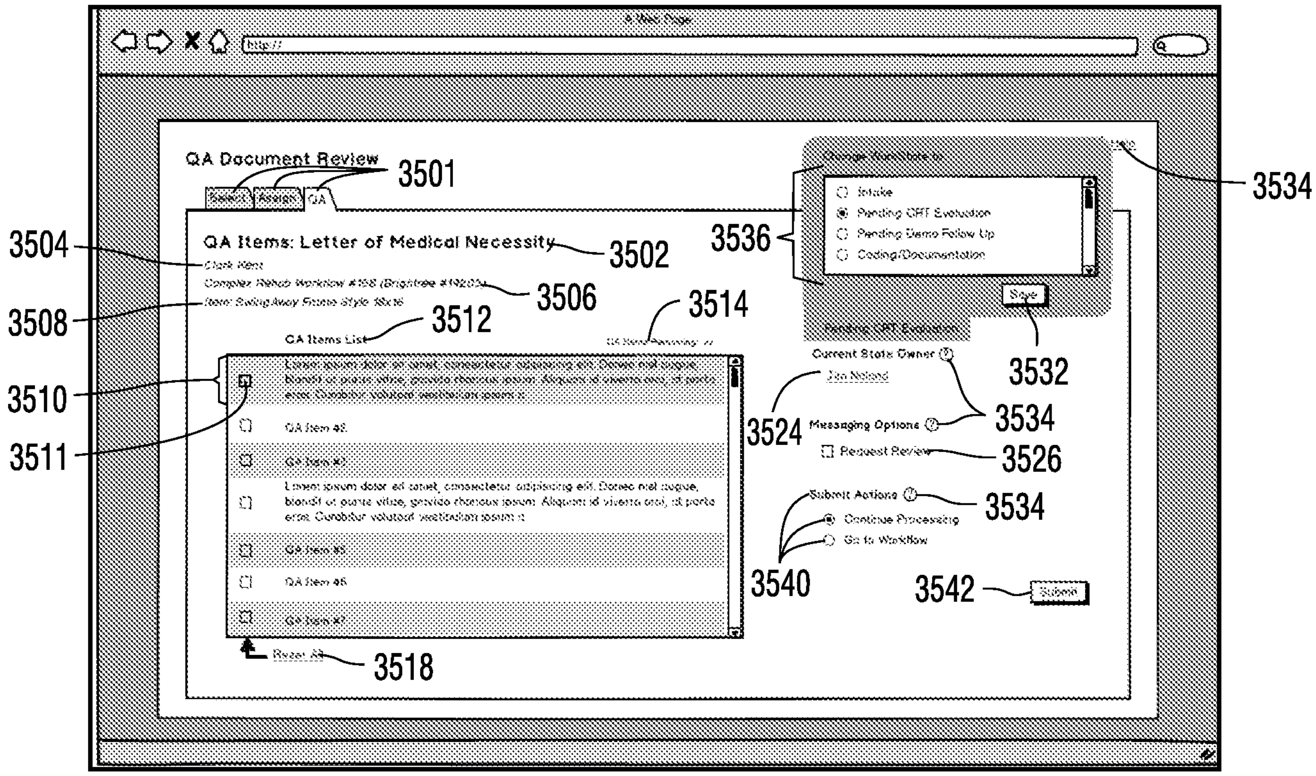


Fig.129

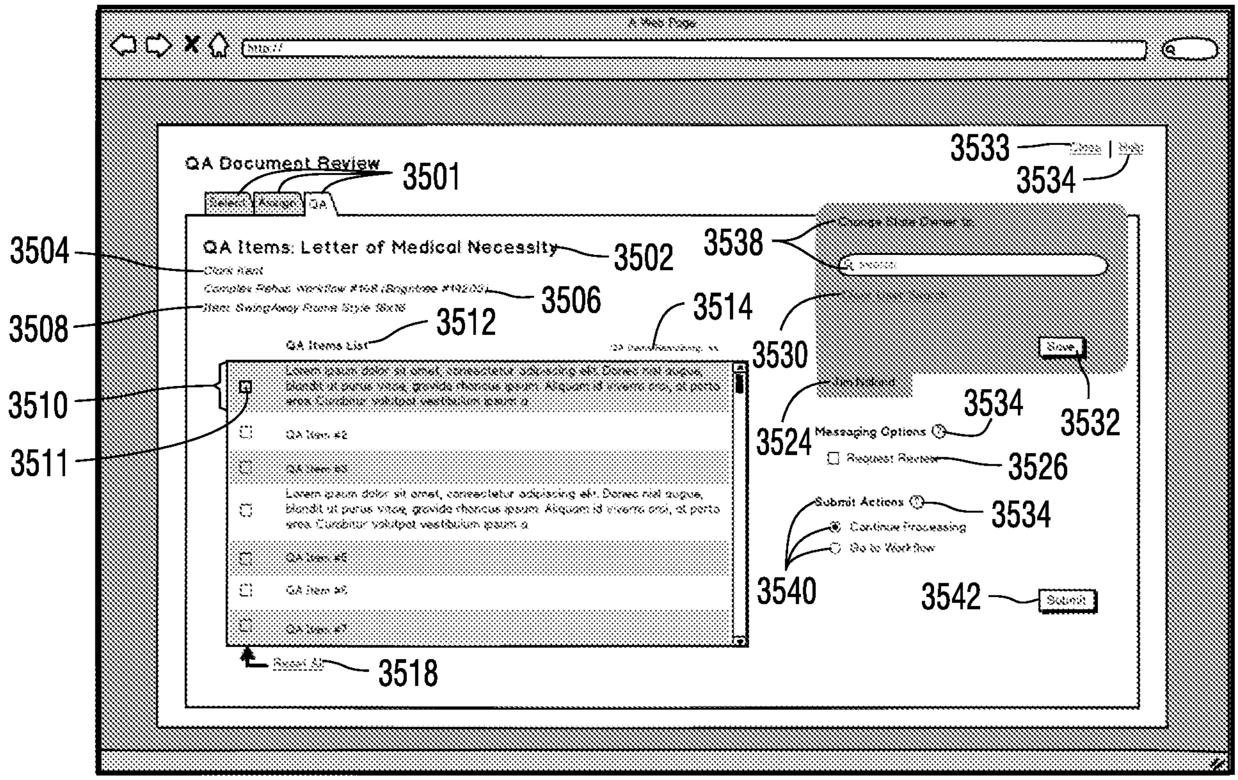


Fig.130

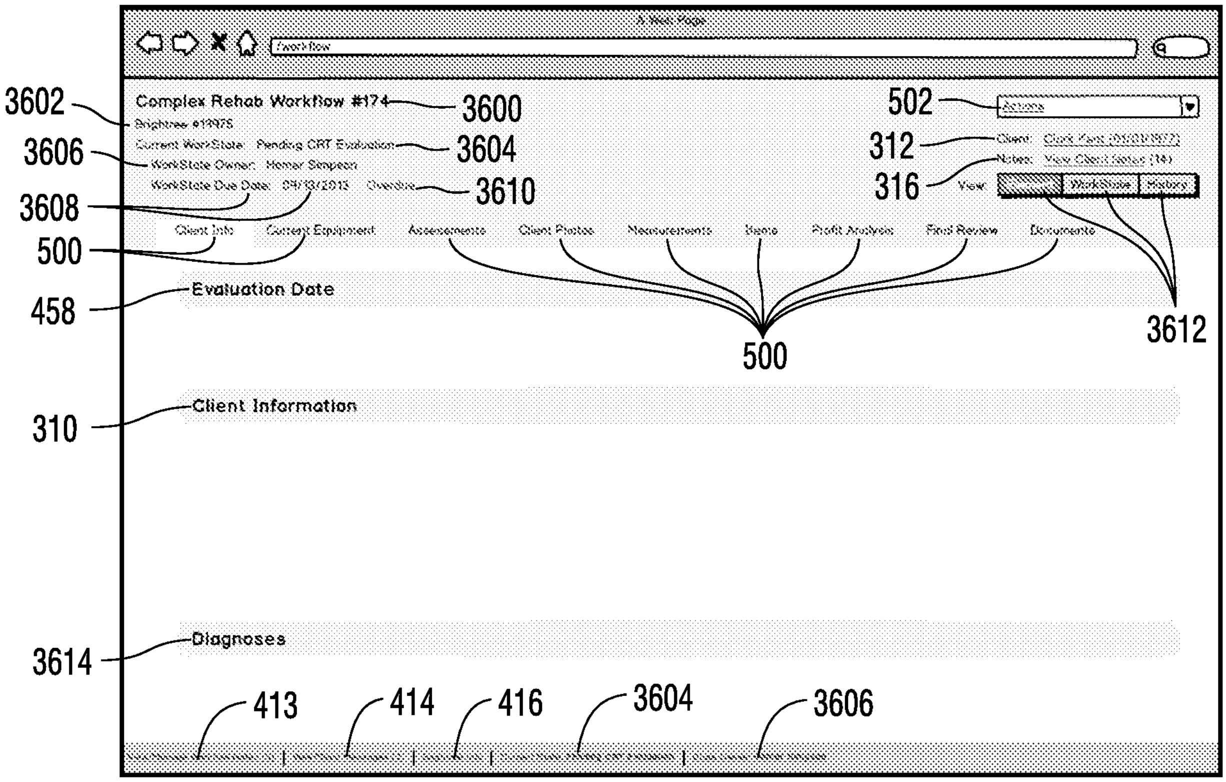


Fig.131

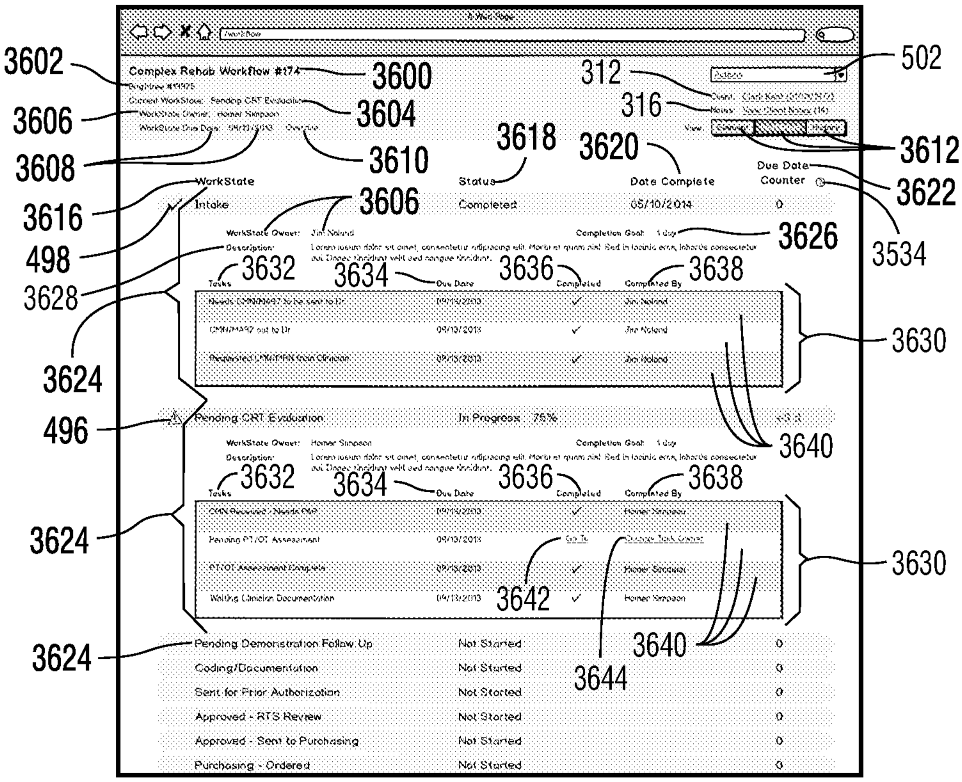


Fig.132

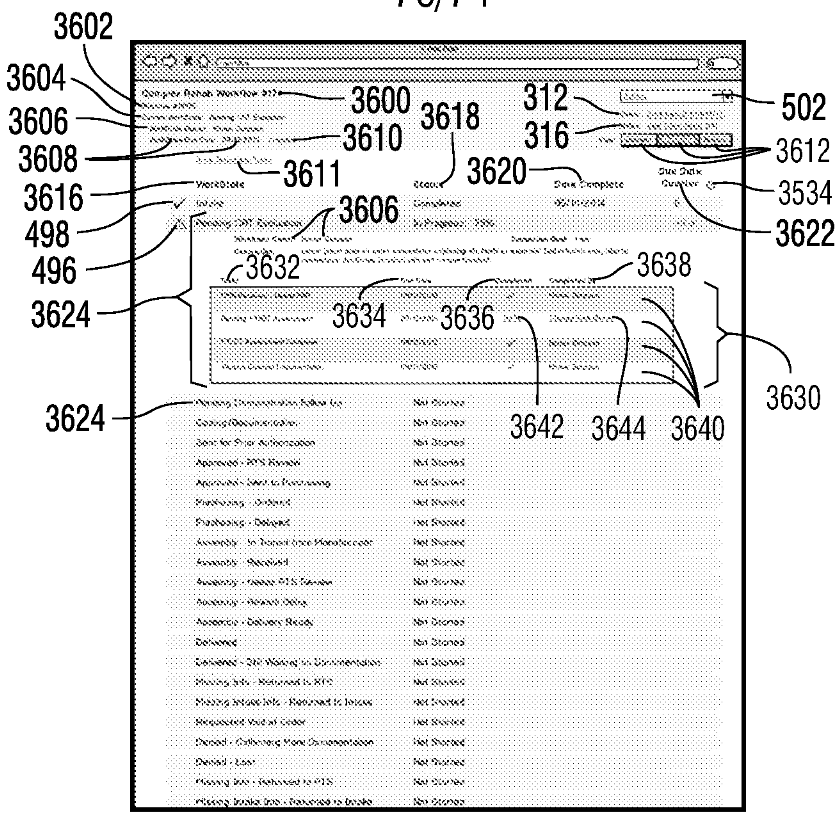


Fig.133

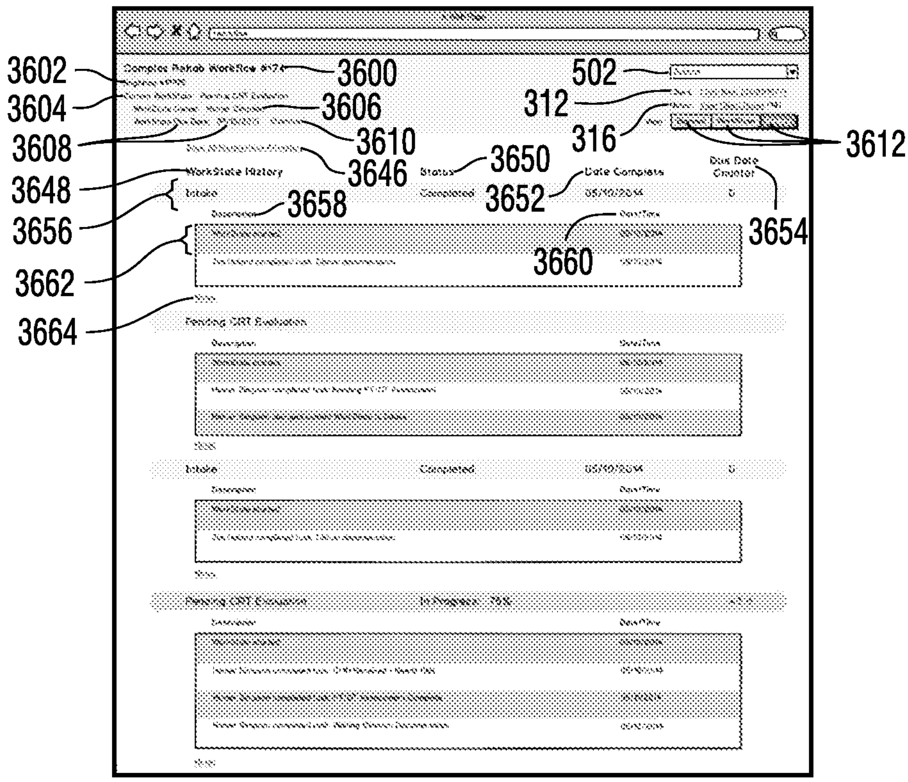


Fig.134

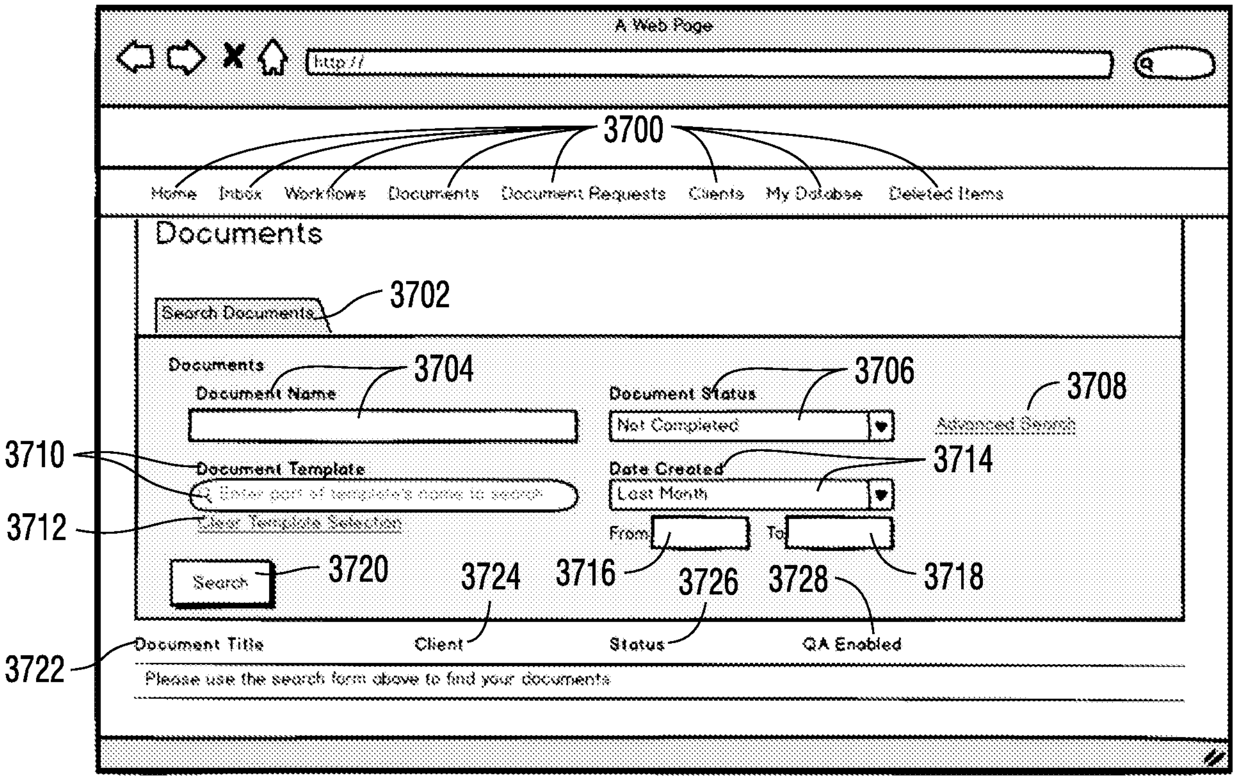


Fig.135

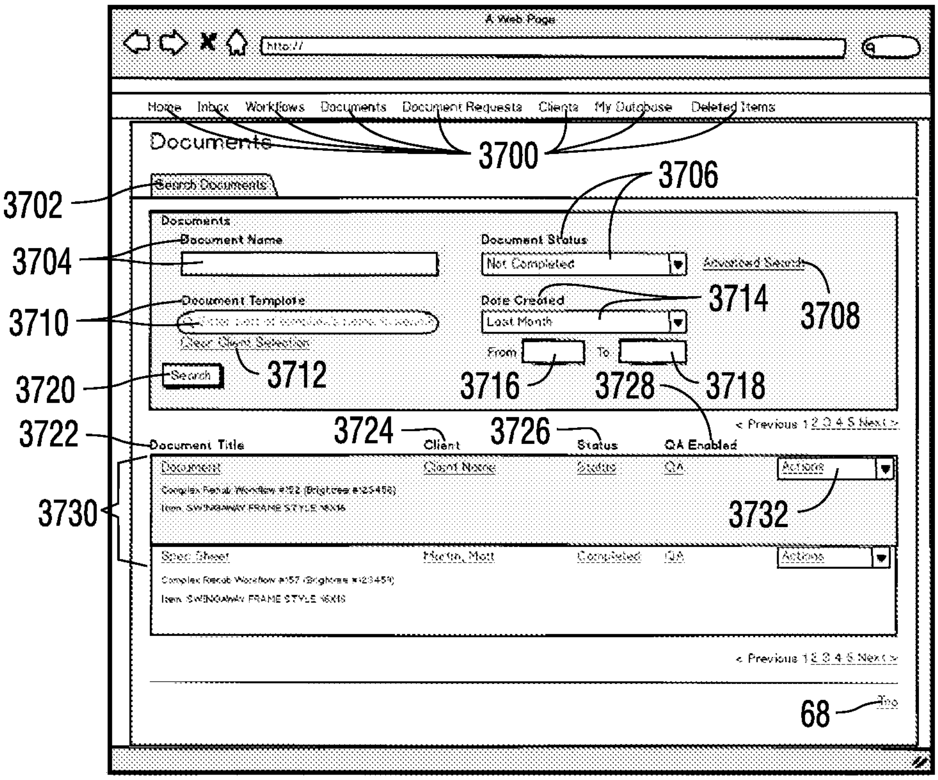


Fig.136

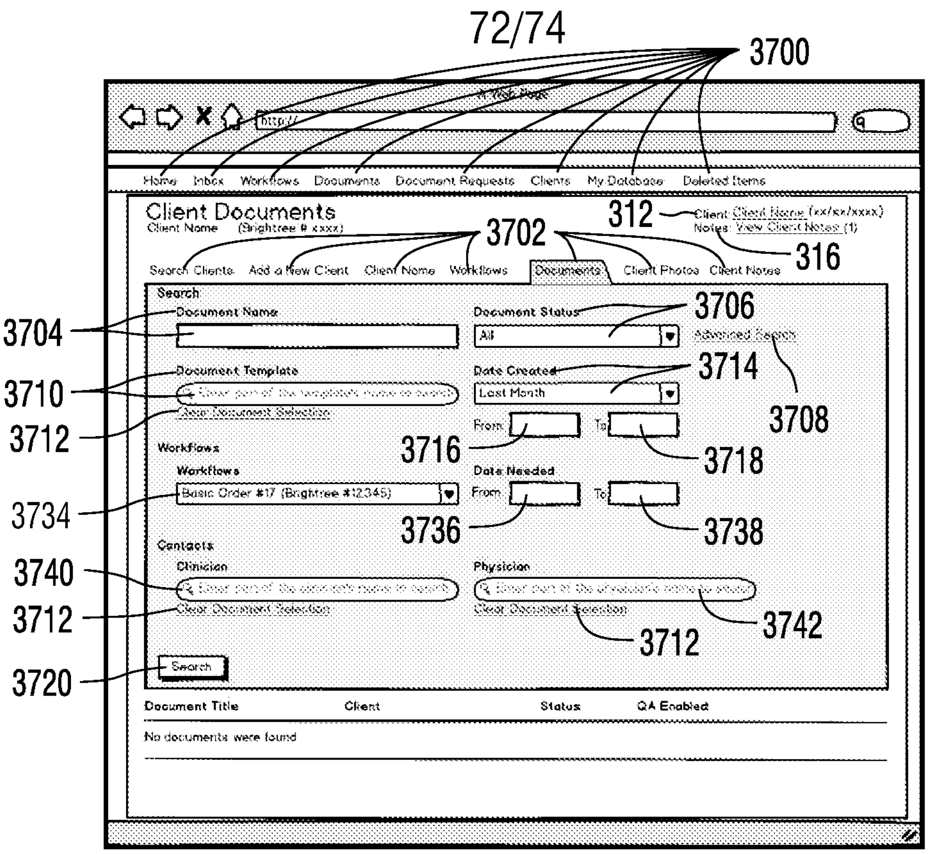


Fig.137

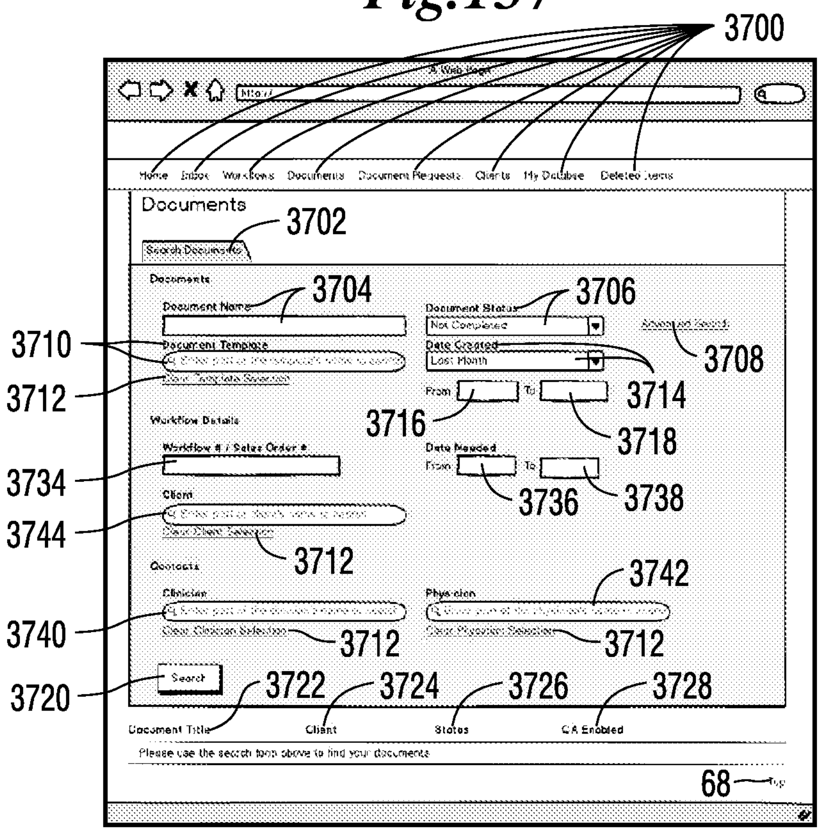


Fig.138

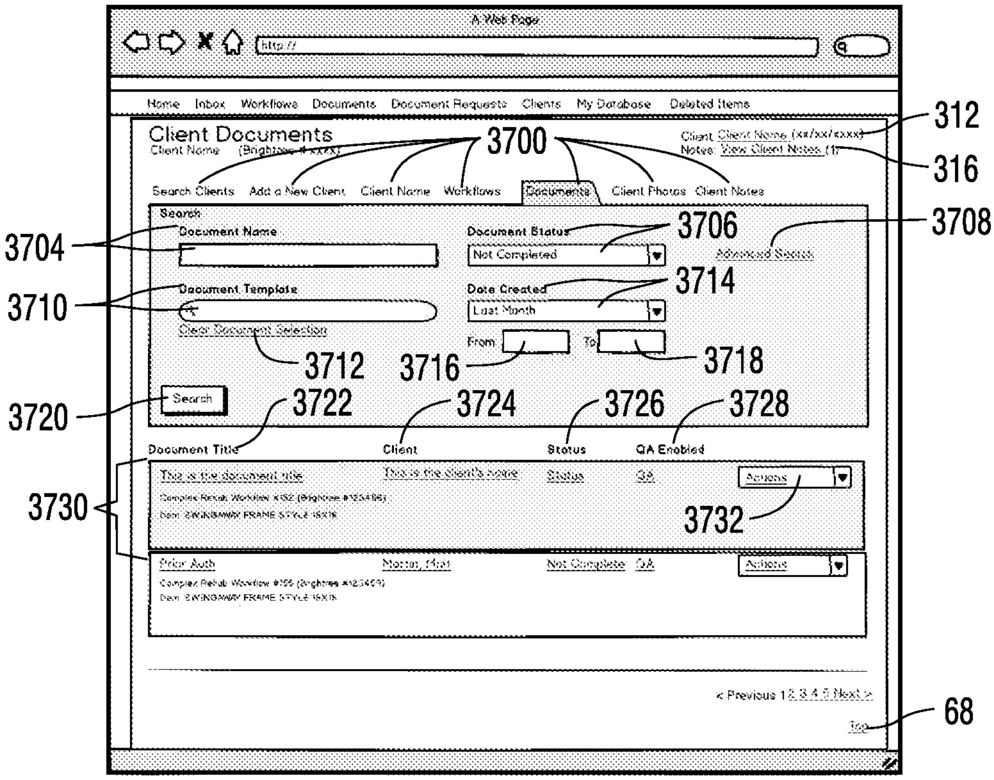


Fig.139

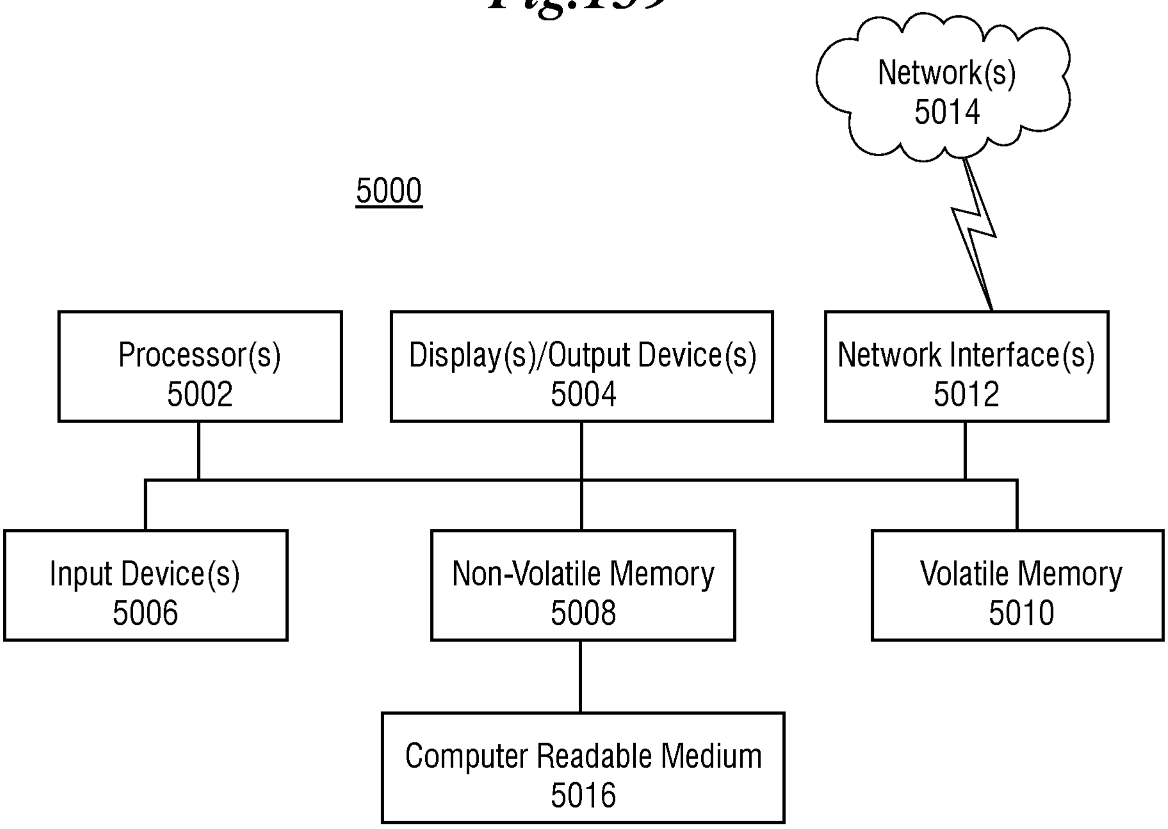


Fig.140

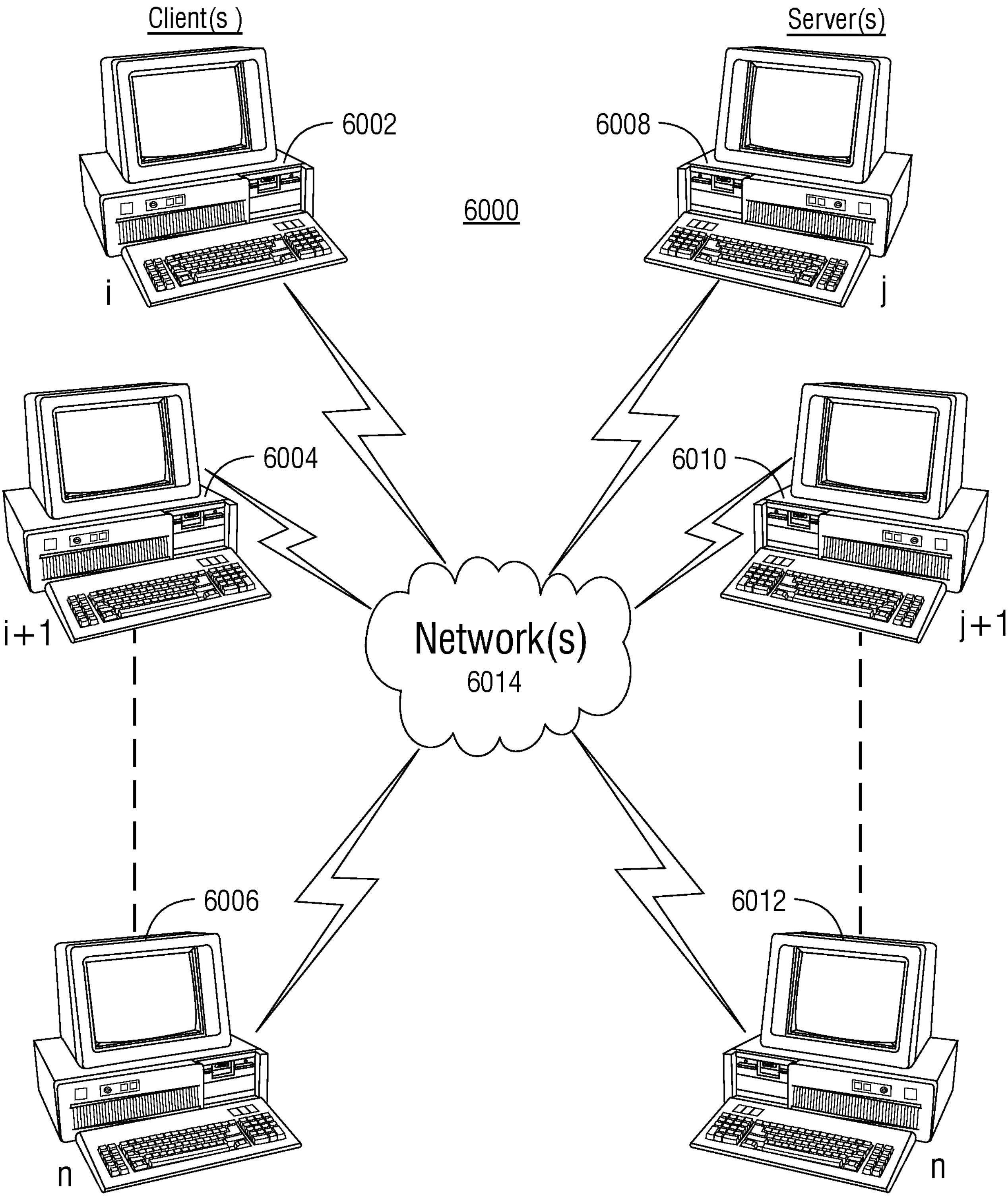

Client(s)
Server(s)
6002
6008
6000
i
j
6004
6010
i+1
j+1
Network(s)
6014
6006
6012
n
n

Fig.141

INTERNATIONAL SEARCH REPORT

International application No.
PCT/US2015/037769

A. CLASSIFICATION OF SUBJECT MATTER
IPC(8) - G06Q 10/06 (2015.01)
CPC - G06Q 10/0633 (2015.04)
According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)
IPC(8) - G06F 3/048; G06Q 10/00; G06Q 10/06 (2015.01)
USPC - 705/7.26; 705/7.27; 717/104

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched
CPC - G05B 2219/31449; G06 Q10/06; G06Q 10/0633; G06Q 10/103 (2015.04) (keyword delimited)

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
PatBase,Google Patents, Google Scholar, Google.
Search terms used:mapping, workflow, criteria, create, template

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X --- Y	US 2007/0038499 A1 (MARGULIES et al.) 15 February 2007 (15.02.2007) entire document	1,2,4-6,8-19,21-36,39,40, 42-44,46-57,59-74,77,78, 80-82,84-95,97-112 --- 3,7,20,41,45,58,79,83,96
Y	US 2007/0038494 A1 (KREITZBERG et al) 15 February 2007 (15.02.2007) entire document	3,41,79
Y	US 2005/0228683 A1 (SAYLOR et al) 13 October 2005 (13.10.2005) entire document	7,45,83
Y	US 2008/0172251 A1 (REICHERT et al) 17 July 2008 (17.07.2008) entire document	20,58,96
P,A	US 2015/0142498 A1 (LATISTA TECHNOLOGIES, INC.) 21 May 2015 (21.05.2015) entire document	1-36,39-74,77-112
A	US 2004/0044966 A1 (MALONE) 04 March 2004 (04.03.2004) entire document	1-36,39-74,77-112
A	US 2012/0054110 A1 (VELA) 01 March 2012 (01.03.2012) entire document	1-36,39-74,77-112

☐ Further documents are listed in the continuation of Box C. ☐ See patent family annex.

* Special categories of cited documents:
"A" document defining the general state of the art which is not considered to be of particular relevance
"E" earlier application or patent but published on or after the international filing date
"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)
"O" document referring to an oral disclosure, use, exhibition or other means
"P" document published prior to the international filing date but later than the priority date claimed
"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
"&" document member of the same patent family

Date of the actual completion of the international search	Date of mailing of the international search report
09 October 2015	09 NOV 2015

Name and mailing address of the ISA/	Authorized officer
Mail Stop PCT, Attn: ISA/US, Commissioner for Patents P.O. Box 1450, Alexandria, Virginia 22313-1450 Facsimile No. 571-273-8300	Blaine Copenheaver PCT Helpdesk: 571-272-4300 PCT OSP: 571-272-7774

INTERNATIONAL SEARCH REPORT

International application No.
PCT/US2015/037769

Box No. II Observations where certain claims were found unsearchable (Continuation of item 2 of first sheet)

This international search report has not been established in respect of certain claims under Article 17(2)(a) for the following reasons:

1. ☐ Claims Nos.:
because they relate to subject matter not required to be searched by this Authority, namely:

2. ☐ Claims Nos.:
because they relate to parts of the international application that do not comply with the prescribed requirements to such an extent that no meaningful international search can be carried out, specifically:

3. ☐ Claims Nos.:
because they are dependent claims and are not drafted in accordance with the second and third sentences of Rule 6.4(a).

Box No. III Observations where unity of invention is lacking (Continuation of item 3 of first sheet)

This International Searching Authority found multiple inventions in this international application, as follows:
(see last page)

1. ☐ As all required additional search fees were timely paid by the applicant, this international search report covers all searchable claims.

2. ☐ As all searchable claims could be searched without effort justifying additional fees, this Authority did not invite payment of additional fees.

3. ☐ As only some of the required additional search fees were timely paid by the applicant, this international search report covers only those claims for which fees were paid, specifically claims Nos.:

4. ☒ No required additional search fees were timely paid by the applicant. Consequently, this international search report is restricted to the invention first mentioned in the claims; it is covered by claims Nos.:
1-36,39-74,77-112

Remark on Protest

☐ The additional search fees were accompanied by the applicant's protest and, where applicable, the payment of a protest fee.

☐ The additional search fees were accompanied by the applicant's protest but the applicable protest fee was not paid within the time limit specified in the invitation.

☐ No protest accompanied the payment of additional search fees.

(Box III continued)

This application contains the following inventions or groups of inventions which are not so linked as to form a single general inventive concept under PCT Rule 13.1. In order for all inventions to be examined, the appropriate additional examination fees must be paid.

Group I, claims 1-36,39-74,77-112, drawn to workflow management of document processing through a user interface on a display device.
Group II, claims 37-38,75-76,113-114, drawn to rendering a document through a template builder interface on a display device.

The inventions listed as Groups I and II do not relate to a single general inventive concept under PCT Rule 13.1 because, under PCT Rule 13.2, they lack the same or corresponding special technical features for the following reasons: the special technical feature of the Group I invention: mapping to a workflow a template set whose criterion is satisfied by one of the objects associated with the workflow; and generating a workflow of documents that are each rendered from the stored rendering-data in a template within a template set mapped to the workflow as claimed therein is not present in the invention of Group II. The special technical feature of the Group II invention: subsequently receiving input dragging and sizing a selected field template onto the editable template, with the field template location corresponding to editable location values within the editable template; displaying editable field properties comprising a required-field flag, a flag to propagate both the field template and its received data to subsequent pages upon rendering, a default value, and a comparison value as claimed therein is not present in the invention of Group I.

Groups I and II lack unity of invention because even though the inventions of these groups require the technical feature of a computer-implemented method for document processing; interface on a display device; an editable template, this technical feature is not a special technical feature as it does not make a contribution over the prior art.

Specifically, US 2004/0044966 A1 (MALONE) 04 March 2004 (04.03.2004) teaches a computer-implemented method for document processing and interface on a display device (Application Support 106 can generate the DOM describing the XHTML document and render the document for Display 103 for viewing by the user, Para. 23); an editable template (The screen initially presents Template 201 and Edit Bar 202 to the user, Para. 26 and Fig. 2).

Since none of the special technical features of the Group I or II inventions are found in more than one of the inventions, unity of invention is lacking.