

**VALLEYCARE  
OLIVE VIEW-UCLA MEDICAL CENTER/HEALTH CENTERS  
INPATIENT FINANCIAL SERVICES  
POLICY & PROCEDURE**

**NUMBER: 2221  
VERSION: 1**

**SUBJECT/TITLE: LOG/REVIEW CASES**

**POLICY:**

**PURPOSE: To describe the process of logging and reviewing Medi-Cal cases by the Budget Unit for statistical purposes.**

**DEPARTMENTS: INPATIENT FINANCIAL SERVICES**

**DEFINITIONS:**

**PROCEDURE:**

**RESPONSIBILITY ACTION**

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- BUDGET CLERK**
- (1) Receive certified Medi-Cal cases daily, and separate Inpatient and Outpatient cases, then by approvals, denials, rejections, and updated cases.
    - A. Review cases to ensure appropriate documents are on file.
    - B. Ensure LEADER Case Comments printout is on file showing case is certified.
    - C. Review Route Slip (Attachment I) for final disposition, and make any appropriate adjustments regarding case disposition, including retro months.
  - (2) Access Budget Control Log (Attachment II) in Word program in personal computer.
    - A. Begin logging cases, prioritizing oldest application dates first.
    - B. Enter all applicable information, specific to each case.
    - C. Enter worker’s file number in “Remarks”.
    - D. If Inpatient, enter admit date in “Remarks”.
    - E. If Outpatient, enter clinic in “Remarks”.

**SUBJECT/TITLE: LOG/REVIEW CASES**

**Policy Number: 2221**

**Page Number: 2**

**BUDGET CLERK**

**(Continued)**

- (3) Print 4 copies of completed Budget Control Log, and distribute as follows:
  - A. One copy to ISTC.
  - B. One copy to Trial Balance Clerk.
  - C. One copy to Opening Desk Clerk.
  - D. One copy to PFS Control Worker.
  
- (4) Stamp Route Slip with date processed. Place in designated area for continued case processing and input into the PFS Case Tracking System (CTS) in Affinity, per existing procedures in the CTS Manual.

References:	
Approved by: Katherine Salcido (Assistant Hospital Administrator III)	Date: 12/27/2010
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