

LucidAct CMO

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**Action**

ALVIN WELLS

Action: Assignment Back to PCP  
Days Referred: 25

ANTHONY BISHOP

Action: Fill out MZ Questionnaire  
Days Referred: 13

Bill Coppland

Action: Insurance Verification  
Days Referred: 5

BILLIE ROBINSON

Action: Insurance+Destination Type (Study)  
Days Referred: 45

BRADLEY WRIGHT

Action: Assign Destination  
Days Referred: 336

**Action: Insurance Verification**  
ID: 14975492  
Home 415-785-0957  
Language: English  
Ins: SFHN

**Assignment**

New

Patient mentioned Medicare. Will need verification from Finance.

**Others**

Healthy SF

SFHP

Medicaid

Medicare

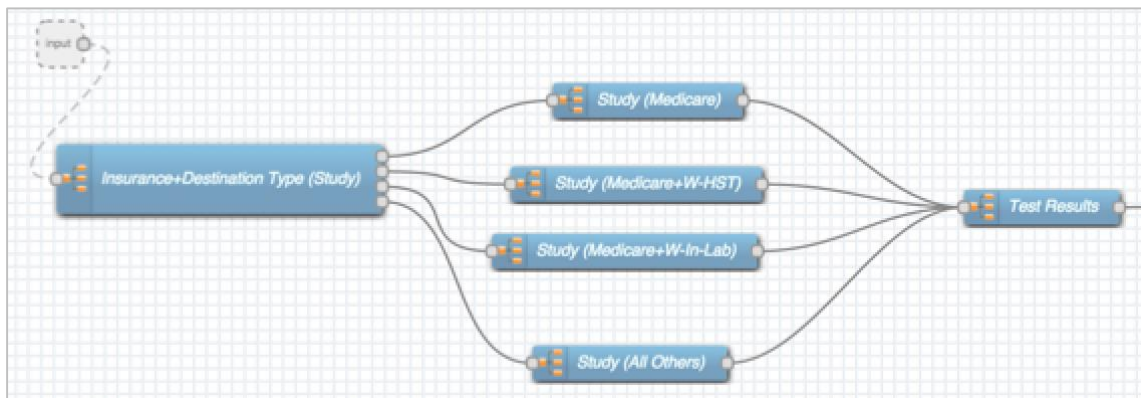
Dest: Mt Zion

Not Now Save Changes

**Previous Actions**

UNCATEGORIZED  
New Referral Entry  
Insurance Verification

**Figure 1: Sample task list for clinic manager.** Selected patient requires insurance verification. “Action” column on the left shows patient list, pending actions, days referred, pathway step, and days at specific pathway. CCM = chronic care management, SFHN = San Francisco Health Network, SFHP = San Francisco Health Plan, “No Show” = patient was a no-show for a face-to-face clinic appointment.



**Figure 2: Sample screenshot of pathway editor. SFGH Sleep Program.** The Actions of insurance verification and assignment of a diagnostic testing destination are mapped. W = Westlake Sleep Center, HST = home sleep test