

ClickUp Medical Practice Blueprint

The PHI-safe board to build, list by list. Chart numbers only. | ClinicOps

Build this structure in ClickUp (or Monday, or Asana) and you can run the operational side of a practice without patient data ever entering the tool. Every field below is a workflow field or a chart number. No names, no dates of birth, no diagnoses.

1 SPACE & LISTS

List	Purpose	Statuses (stages)
Prior Auth	Track every auth to a decision	Needed → Submitted → Pending → Approved / Denied → Resubmit → Expiring soon
Credentialing	Provider + payer enrollment and renewals	Not started → Submitted → In review → Active → Renewal due
Denials / AR	Work every denial to paid	New → Appealing → Awaiting decision → Paid / Written off
Front Desk Tasks	Recurring and one-off desk work	To do → Doing → Done

2 CUSTOM FIELDS (the same across lists)

Field	Type	Notes
Chart #	Text / number	The ONLY patient reference. Never the name.
Payer	Dropdown	Your active payer list
Owner	People	One accountable person per item
Due / deadline	Date	Follow-up or appeal deadline
Auth expiration	Date	Drives the expiration alarm
Amount	Number / money	Denials / AR only

3 AUTOMATIONS (build these five)

When	Then
An item sits in Submitted / Pending for 48h, 5d, 10d	Notify the owner to follow up
Auth expiration is within 14 days and item not closed	Flag it and alert the owner
Status changes to Denied	Create a resubmission / appeal task with the deadline
Every morning	Send the manager a digest of at-risk and overdue items
An item is overdue past threshold	Escalate to the manager

4 VIEWS

Owner dashboard (one screen: pending, at-risk, overdue) • **By stage** (board grouped by status) • **Expiring soon** (sorted by auth expiration) • **By payer** (spot payer patterns).

THE ONE RULE: Chart numbers only. Because no PHI ever enters the tool, you do not need the Enterprise tier or a BAA. The board holds the workflow; your EHR holds the patient.

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