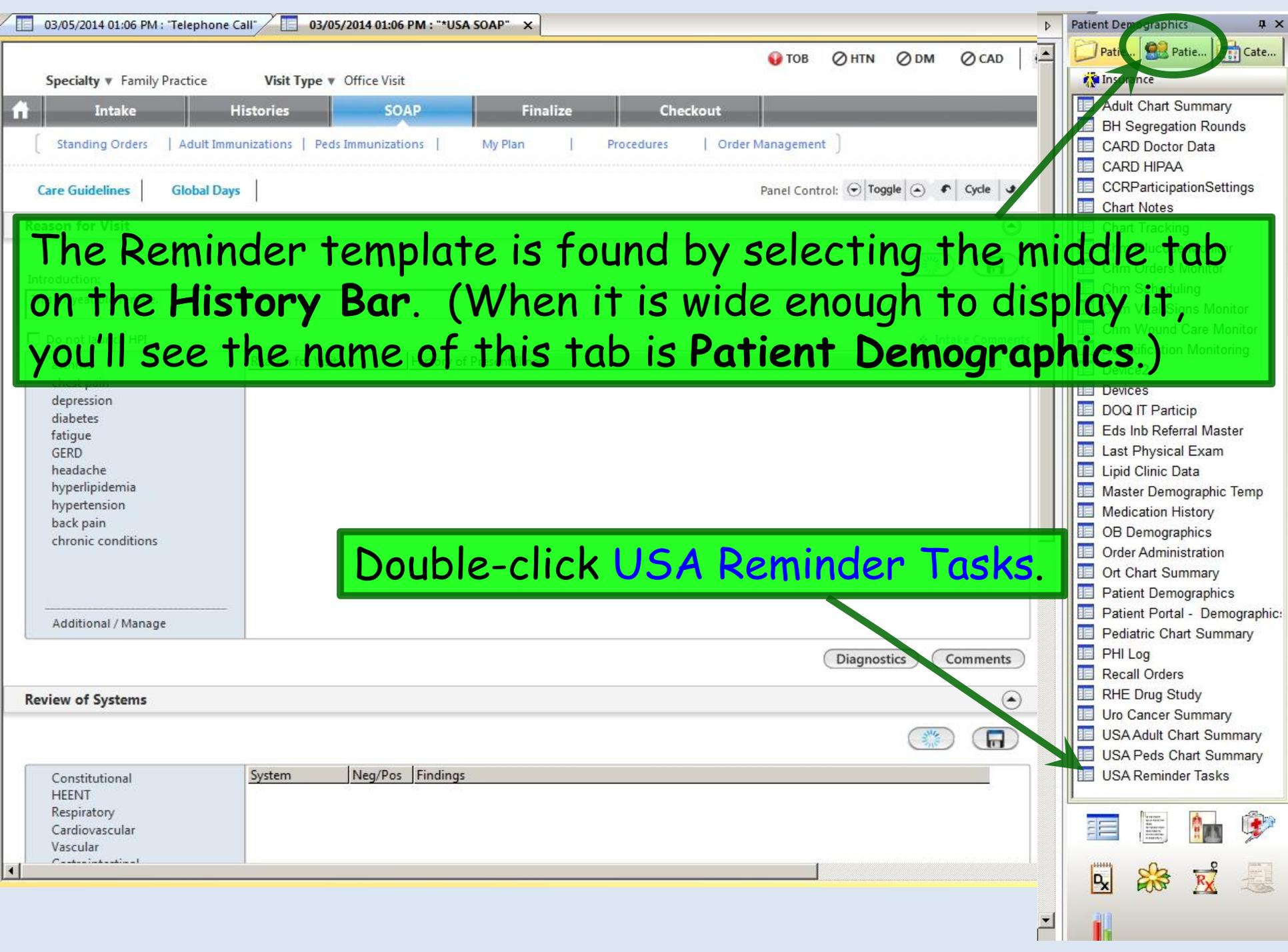# NEXTGEN REMINDER TASK DEMONSTRATION

This demonstration reviews usage of the Reminders template.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Reminder Tasks

• Users have frequently requested a way to send themselves or others a "reminder"—a task that will appear at some time in the future. We now have that functionality.

• This isn't actually a NextGen feature—though it sure ought to be. This solution was contributed by another NextGen user.

Patient Dem graphics   ▯ ✕

Pati...   Patie...   Cate...

Specialty ▾ Family Practice   Visit Type ▾ Office Visit

● TOB   ⊘ HTN   ⊘ DM   ⊘ CAD

🏠   Intake   Histories   SOAP   Finalize   Checkout

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines   Global Days

Panel Control: ⊙ Toggle ⊙ ⟲ Cycle ⟳

Reason for Visit

Introduction:

Do not Include HPI

chest pain
depression
diabetes
fatigue
GERD
headache
hyperlipidemia
hypertension
back pain
chronic conditions

_____

Additional / Manage

Insurance

Adult Chart Summary
BH Segregation Rounds
CARD Doctor Data
CARD HIPAA
CCRParticipationSettings
Chart Notes
Chart Tracking
Chm Orders Monitor
Chm Scheduling
Chm Observations Monitor
Chm Wound Care Monitor
Medication Monitoring
Devices
Devices
DOQ IT Particip
Eds Inb Referral Master
Last Physical Exam
Lipid Clinic Data
Master Demographic Temp
Medication History
OB Demographics
Order Administration
Ort Chart Summary
Patient Demographics
Patient Portal - Demographic:
Pediatric Chart Summary
PHI Log
Recall Orders
RHE Drug Study
Uro Cancer Summary
USA Adult Chart Summary
USA Peds Chart Summary
USA Reminder Tasks

The Reminder template is found by selecting the middle tab on the History Bar. (When it is wide enough to display it, you'll see the name of this tab is Patient Demographics.)
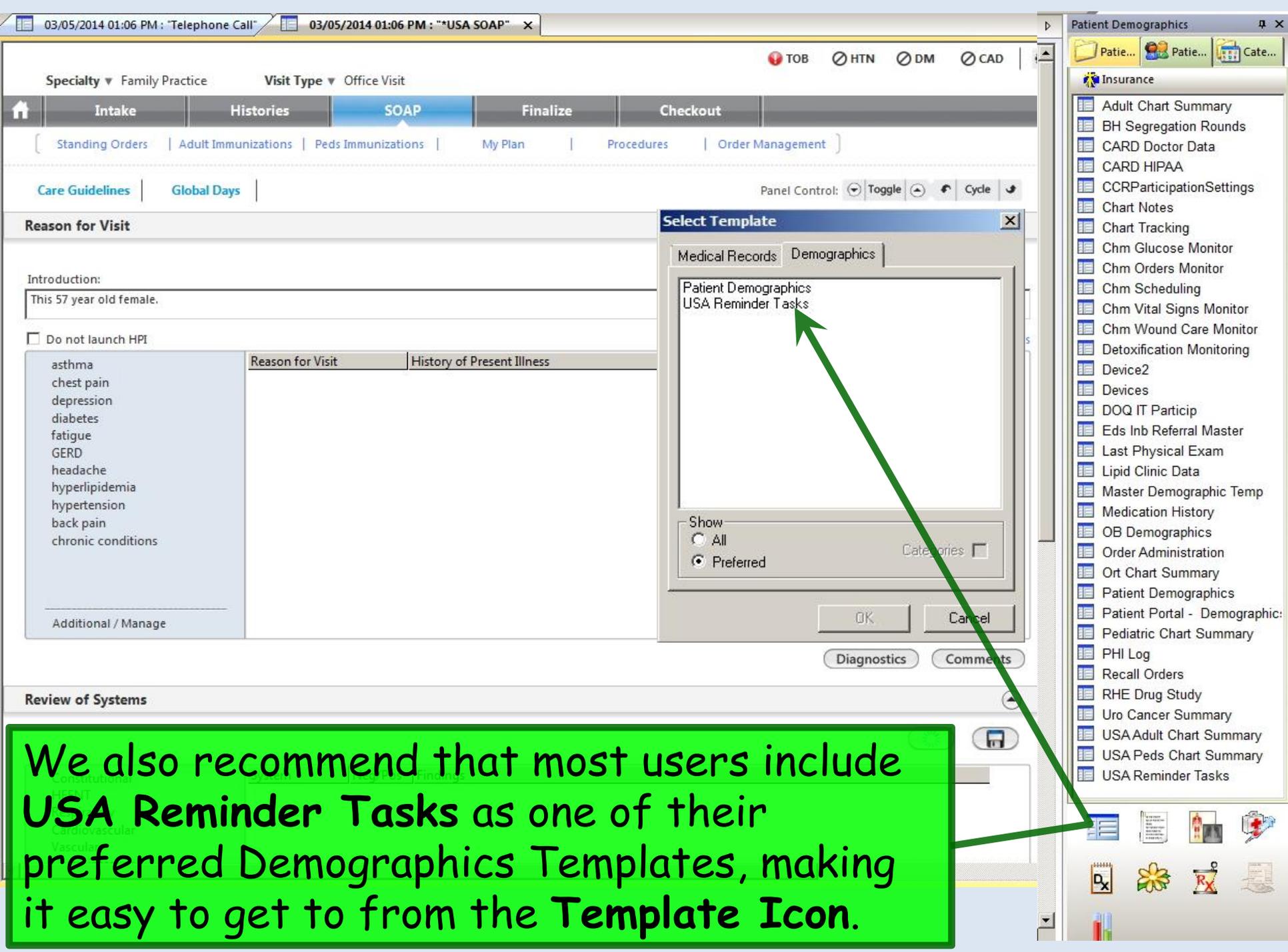
Double-click USA Reminder Tasks.

Diagnostics   Comments

Review of Systems   ⊙

☀   💾

System	Neg/Pos	Findings
Constitutional		
HEENT		
Respiratory		
Cardiovascular		
Vascular		
Gastrointestinal		

💊   🌼   ℞   📋

🧪

Patient Demographics ⫴ ✕

Patie... | Patie... | Cate...

🔴 TOB   ⊘ HTN   ⊘ DM   ⊘ CAD

Specialty ▾ Family Practice   Visit Type ▾ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout |

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management]

Care Guidelines | Global Days

Panel Control: ⊙ Toggle ⊘ ↶ Cycle ↷

Reason for Visit

Select Template ✕

Medical Records | Demographics

Patient Demographics
USA Reminder Tasks

Introduction:
This 57 year old female.

☐ Do not launch HPI

	Reason for Visit	History of Present Illness
asthma		
chest pain		
depression		
diabetes		
fatigue		
GERD		
headache		
hyperlipidemia		
hypertension		
back pain		
chronic conditions		

Additional / Manage

Show
○ All
● Preferred

Categories ☐

OK   Cancel

Diagnostics   Comments

Review of Systems

🪟 Insurance

- Adult Chart Summary
- BH Segregation Rounds
- CARD Doctor Data
- CARD HIPAA
- CCRParticipationSettings
- Chart Notes
- Chart Tracking
- Chm Glucose Monitor
- Chm Orders Monitor
- Chm Scheduling
- Chm Vital Signs Monitor
- Chm Wound Care Monitor
- Detoxification Monitoring
- Device2
- Devices
- DOQ IT Particip
- Eds Inb Referral Master
- Last Physical Exam
- Lipid Clinic Data
- Master Demographic Temp
- Medication History
- OB Demographics
- Order Administration
- Ort Chart Summary
- Patient Demographics
- Patient Portal - Demographics
- Pediatric Chart Summary
- PHI Log
- Recall Orders
- RHE Drug Study
- Uro Cancer Summary
- USA Adult Chart Summary
- USA Peds Chart Summary
- USA Reminder Tasks

We also recommend that most users include **USA Reminder Tasks** as one of their preferred Demographics Templates, making it easy to get to from the **Template Icon**.

Click in the Reminder Recipient box to select the recipient of the reminder. Note that you can select yourself, & you can type the first few letters of the last name to rapidly scroll down the list.

Click in the Reminder Date box & pick the date you want the reminder to be received. Notice you also have several bullets you can select for various periods in the future.

05/26/2013 11:18 AM : "*USA Finalize"   USA Reminder Tasks ✕

Reminder Tasks

Reminder Recipient (can be yourself): | Duffy, Robert

Months from Now

Reminder Date: | 06/04/2013   ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 9 ○ 12
(Date you wish reminder
to be received)

Recall Date   ✕

Topic/Description: |

Click to send reminder task: | Send Task

| ◄ | June, 2013 | ► |

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	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	1	2	3	4	5	6

Existing Reminder Tasks
Display ● all ○ uncompleted ○ completed

Due Date	Topic/Description	Details/C

Today | OK | Cancel

Use the Topic/Description & Details/Comments boxes to make your entries.

05/26/2013 11:18 AM : "*USA Finalize"   USA Reminder Tasks ✕

Reminder Tasks

Save & Close

Reminder Recipient (can be yourself): Duffy, Robert

Months from Now

Reminder Date: 06/04/2013   ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 9 ○ 12
(Date you wish reminder
to be received)

Topic/Description: Chest CT   Details/Comments: If haven't gotten chest CT report by this date, make sure
                                                        he had it done, & look for report.

Click to send reminder task: Send Task

Patient's Next Appointment

[   ] [   ] see all appt's

Existing Reminder Tasks
Display ○ all ○ uncompleted ○ completed   ☐ Enable row selection to copy existing order

Due Date	Topic/Description	Details/Comments	Reminder Recipient	Completed By	Ordered By	Date Ordered

When your entries are done, click Send Task.

You'll probably think of a lot of uses for these reminders. Here, for example, I'm covering for a colleague, & I've reviewed some lab results on the patient. There's nothing critical that needs action right now, but the lipids are a little borderline. It's a judgment call as to whether to adjust medications—something better left to the PCP upon his return.

If I send a regular task, I (& everyone else covering) is going to have to look at it every day until he returns. So instead I'll send a Reminder Task that won't appear until the day he comes back.

05/26/2013 10:32 AM : "*USA SOAP"   USA Reminder Tasks ×

Reminder Tasks

Save & Close

Reminder Recipient (can be yourself): McFaden, Thomas

Months from Now

Reminder Date: 06/10/2013   ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 9 ○ 12
(Date you wish reminder
to be received)

Topic/Description: FYI--Lab results

Details/Comments: While you were gone I reviewed your lab results on this pt. Nothing requiring urgent attention, but you may wish to review lipid panel to see what you want to do.

Click to send reminder task: Send Task

You'll get Reminder Tasks in your inbox just like other tasks.

Click the Chart button, then ACCEPT the task in the ensuing popup.

The Reminder Template (or a variant thereof) opens.

Recall Orders ✕

Recall (Reminder) Orders

Save & Close

Add a Recall Order

Months from Now

Recall Date [/ /]   ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 9 ○ 12

Event [Chest CT]

Event Comments: If haven't gotten chest CT report by this date, make sure he had it done, & look for report.

○ favorites ○ all

Responsible Party [Duffy, Robert]

[Add Order]

Patient's Next Appointment   [see all appt's]

Existing Recall Orders

Display ○ all ○ uncompleted ○ completed   ☐ Enable row selection to copy existing order

Due Date	Event	Responsible Party	Completed By	Ordered By	Date Ordered
06/04/2013	Chest CT	Duffy, Robert	Robert L. Duffy	Robert L. Duffy	06/04/2013

For further details, click the Line on the grid.

Reminder/Recall Item

By

☑ Ordered | Robert L. Duffy | 06/04/2013 | 12:47 AM

☐ Completed | | |

You can click the Completed box; that will also mark the task completed in your Inbox.

Order Details

Topic/Description Chest CT

Reminder Date 06/04/2013

⦿ favorites   ○ all

Reminder Recipient Duffy, Robert

Details/Comments If haven't gotten chest CT report by this date, make sure he had it done, & look for report.

Completion Details

Completion Comments

Reminder Task Sent   Jun 4 2013 4:00AM

You can add **Completion Comments** as necessary or desired.

⦅ « | ‹ | Clear For Add | Delete | Save | Close | › | » ⦆

Reminder/Recall Item

	By	Date	Time
☑ **Ordered**	Robert L. Duffy	06/04/2013	12:47 AM
☑ **Completed**	Robert L. Duffy	06/04/2013	12:54 PM

Order Details

Topic/Description Chest CT

Reminder Date 06/04/2013

⦿ favorites   ○ all

Reminder Recipient Duffy, Robert

Details/Comments If haven't gotten chest CT report by this date, make sure he had it done, & look for report.

Completion Details

Completion Comments Got it.

Reminder Task Sent Jun 4 2013 4:00AM

When done click Save & Close. You can then close the chart & move on to your next task.

| ‹‹ | ‹ | Clear For Add | Delete | Save | Close | › | ›› |

This concludes the NextGen Reminder Task demonstration.

Consciousness: That annoying time between naps.

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College of Medicine
Department of Family Medicine