TASK AND PAQ COVERAGE

Cross-coverage for phone calls, refill requests, lab results, etc. always poses a problem for residency programs. Since faculty and residents alike are all essentially part-time providers due to other academic duties, we've always had to cover for each. This can become confusing and inefficient, risking delayed responses, inconsistent customer service, and medical errors.

Every clinic has evolved processes to work around these problems, but now that we have reliable remote access to NextGen, we have the potential to better manage task coverage.

The general idea is that everyone should handle their own tasks and PAQ items once every working day, whether you physically come to the office or not. This way no one provider will have to address a large number of tasks, and more importantly, you'll only be handling tasks for patients you're familiar with, rather than trying to read the minds of your comrades. It will provide better service for your patients, since no one should go more than one business day without having their questions addressed.

However, there will still be times when providers will need to cover for each other, e.g. for vacations, meetings, or duty-hours-mandated reasons. In this case, you'll need to log yourself as "Out of Office" in NextGen. While this has been covered before in most people's training, many users may not recall the details, so let's review that for everyone.

To log yourself as Out of Office, on the NextGen Menu Bar, go to Admin|Workflow Manager|Provider. At the top of this screen, you'll see:

Work Flow Manager: Provider		×
Office Status	\sim -	
Provider: DUFFY, ROBERT LAMAR MD	Is currently: In the Office C Out of the Office C Scheduled	
		- H

The easy, manual way to do this is to click the bullet for **Out of the Office**. The first time you log in after returning, you'll be asked if you want to log yourself as back in the office, which you should do.

An alternative, which is also easy and intuitive, is to click the **Scheduled** bullet. You'll be presented with calendar popups that allow you to specify when you'll be leaving and returning.

Now, whenever other providers in your office log on, they will see a notification like this:

Work Flow Manager	: Delegate N	otificati	on		×
You are a delegate	for the follow	ing provi	ders who a	are currently out of the office	
Provider Name	I	PAQ	Work Flow	Status	
ATKINSON, TANG	ELA C	√	1	Out Mon 05/21/2012 - Wed 05/23/2012, Fri 06/08/2012,	
COX, JEFFREY LA	YNE MD	 Image: A set of the set of the	<	Out of Office.	
JACOBS, TRACY (CHRIST	 Image: A set of the set of the	 Image: A second s	Out of Office.	
MOLOKHIA, EHAP	3 A MD	 Image: A second s	<	Out of Office.	
ROBER	RT ALLE		 Image: A second s	Out of Office.	
RUSSELL, JANET	ANN C	\checkmark	 Image: A second s	Out of Office.	
Don't show delegate	e notifications			Close	

Any time you want to refresh your memory on who is out of office, you can do so through the reporting process. Go to File|Reports|Crystal Reports:

😚 N	extGen	
File	Edit View Tools Admin Utilitie	es Window Help
	<u>N</u> ew	dicine • DUFFY, ROBER
&	Select Patient Alt + P	
	Modify Patient	
	Cl <u>o</u> se Patient	
	<u>S</u> ave	
X	<u>C</u> lose	
	<u>P</u> rint	
	Custom Print \ Fax	
	Export Patient Documents	
	Generate CCD	
	Graph •	
	Reports	<u>G</u> enerate Report
	ChartMa <u>i</u> l	Report List
	Eamily Unit	<u>C</u> rystal Reports
	Next <u>M</u> D	Significant Events
	Patient <u>E</u> ducation	

Next, expand All encounters for All Patient:

Print Print All encounters for Current Patient Preview All encounters for All Patient Export Report Setup Fax Save to Chart Exit Printer Name: Printer Driver: Printer Driver: Print Port;	Report Dialog	X
Image: All encounters for All Patient Preview Image: All encounters for All Patient Export Report Setup Fax Save to Chart Exit Printer Name: Printer Driver: Print Port; Print Port;	This encounter for Current Patient	Print
Export Report Setup Fax Save to Chart Exit Printer Name: Printer Driver: Print Port;	 All encounters for Current Patient All encounters for All Patient 	Preview
Printer Name: Printer Driver: Print Port;		Export
Fax Save to Chart Exit		Report Setup
Save to Chart Exit Printer Name: Printer Driver: Print Port;		Fax
Exit Printer Name: Printer Driver: Print Port:		Save to Chart
Printer Name: Printer Driver: Print Port:		Exit
Printer Name: Printer Driver: Print Port:		
Printer Name: Printer Driver: Print Port:		
Printer Name: Printer Driver: Print Port:		
Printer Driver: Print Port:	Printer Name:	
Print Port:	Printer Driver:	
	Print Port:	
Report File:	Report File:	

Then scroll down and find **Provider Out of Office**; you'll see several variants by specialty:

R	eport Dialog		
R	PAQ_031212 Patients Ent Into EMR List_Upg Pending PAQ Documents for FM Pending PAQ ICS images for FM Pending PAQ Images for FM Provider Out of Office-FM Provider Out of Office-OBG Provider Out of Office-Peds Referral_by_spec_with_results Referrals by spec_upgrade		Print Preview Export Report Setup Fax Save to Chart
	 Referrals Not Comp. Upg Superbill2_Upgrade Task not comp fm 4_12 Task not Comp.Upg.FM 	~	Exit
	Printer Name: Printer Driver: Print Port: Report File:		

Select the desired specialty and click **Preview**, and you'll see a list of all providers currently logged as Out of Office:

Family Medicine Providers Currently Out of the Office	6/21/2012	5:15:38PM
FAMILY MEDICINE MOLOKHIA, EHAB PERKINS, ROBERT RUSSELL, JANET		
RESIDENT COX, JEFFREY JACOBS, TRACY		

To cover for your partners, we have two workflow variants.

The first is to view your partners' tasks manually, which is NextGen's default workflow. Say you know you need to cover for your teammate, Dr. Cox. To view tasks that may have been sent to Dr. Cox, open your Inbox/Workflow, then click the notepad icon at the upper right of your task list. Next click on **View Tasks For**, and select Dr. Cox:

🖀 Work Flow [Duffy, Robert L]										
Appointments 6/21/2012 -	🏌 Duffy		All Tasks	Refills	Test Results	Questions	.]			
Time ⊽ Room Patient/Subject	Reason	Status	! 🗋 🖌 Due	e Date 🛛 🗸	Patient/Sul	bject	<refresh></refresh>			
							Show Completed Tasks Show Deleted Tasks Show Tasks Assigned To	Someone Else		
							Setup Tabs Preferences			
							View Tasks For	Þ	At	dinson, Tangela
									Bar	rber, William E
									Bel	lone, Jessica
									Ber	rger, Loretta
									Be	itencourt, Robert B
									Bro	okshire, Stephanie
			1				1 - 1		Bro	wn, saran
NextMD -					🖉 New Task)elete 🖓 Modify 🛛 🖃	Send	Co	x, Jeffrey
- 🗟 Outbox	🔺 ! 🖂 🚞 🖌 From	n	Subject	R	Received				De	lp, William
- 🔯 Drafts									🖌 [Di	uffy, Robert L]
Archived									Ga	ffney, Jacquelyn
R Prescriptions									Ha	as, Leah M
Inbox									Jac	obs, Tracy

Now instead of seeing your own task list, you'll see his. While each clinic will probably establish its own policy, in general you'd want to answer questions, address test results, etc., that are urgent enough that they can't wait until this team member returns to duty.

Similarly, to view the PAQ items for your teammate, open the PAQ, & click the dropdown provider list, scrolling to the desired provider:

🚡 Signoff Queue - [DUFFY, ROBERT L	AMAR MD]	
Pending Rejected History Description Patient	DUFFY, ROBERT LAMAR MD	Rreview Comments

Visit notes for signoff can be left until the provider's return, but you want to make sure that a test result, letter, or other item that needs immediate attention is taken care of.

For general use, that is all most people need to know. To get this to work properly, however, there is a little bit of setup that is necessary. Note at **Admin|Workflow Manager|Provider** there is the opportunity to choose who can cover your Provider Approval Queue (PAQ):

rk Flow Manager: Provider									
Provider: DUFFY, ROBERT LAMAR MD		~	Is currently: O In the Office O Out of the	Office	• 💿 S	chedul	led [
No schedule is currently setup.									
Providers Users			Provider Approval Queue Work Flow						
ABERNETHY, DURANT MD	~		Name		2		2		
AIKIN, STEPHANIE PA	ī		Use Always						
AKINSANYA, ADEKEMI MD		<pre>ddd</pre>			57	2	57	57	
ALI, WAIL MD		<u></u>							-
ALKILANI, AHMAD MD		<< <u>R</u> emove	RETTENCOURT BOBERT B MD						
ALLISON, ALLESSA D MD									
ALLISON, RONALD C MD		<u>C</u> lear	MOLOKHIA EHABAMD						
ALMANNAI, MOHAMMED MD			MOTLEY CAROL P MD						~
ALONSO, JORGE E MD				-					
ALRIFAI, WAEL MD		+	Use Only When Out of the Office						
ALWAZEER, MOUHAMMAD RAT									
ANDERSON, GRANT MD									
ARORA, ALLURY MD		<< Remove							
RORA, ANKUR MD									
ATKINSON, TANGELA C MD		Clear							
AUSTIN, CHRISTINA MD									
AWAN, GHULAM M MD	~		Delegates are allowed to accept and reject	PAQ it	em typ	es on y	your be	ehalf	=
						ОК		Ca	ncel

And your Work Flow (Task List):

				- 04	• • • • • • • • • • • • • • • • • • •
DUFFY, ROBERT LAMAR MD	•	×	is currently: O in the Office O Out of th	e Unice	
March 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,					
No schedule is currently setup.					
•					
egates					
Providers Users			Provider Approval Queue Work Flow		
ABERNETHY DUBANT MD	~		Name	7	
AIKIN, STEPHANIE PA			Use Always		
AKINSANYA, ADEKEMI MD		<pre><< bbd</pre>		2	•
🗿 ALI, WAIL MD			ATKINSON TANGELAC MD		
🕼 ALKILANI, AHMAD MD		<< <u>R</u> emove	BARBER WILLIAM E MD		
🔏 ALLISON, ALLESSA D MD			BELLONE, JESSICA PHARMD		
ALLISON, RONALD C MD		Llear	BETTENCOURT, ROBERT B MD		
ALMANNAI, MOHAMMED MD			BROWN, SARAH KATHLEEN DO		~
ALONSO, JORGE E MD					
ALRIFAI, WAEL MD		•	Use Only When Out of the Office		
ALWAZEER, MOUHAMMAD RAT		Add >>			
ANDERSON, GRANT MD					
ARORA, ALLURY MD		< Remove			
AKURA, ANKUR MD		Clear			
		Ciear			
AUSTIN, CHRISTINA MD					
AWAN, GHULAM M MD	~		Delegates are allowed to accept and com	plete W	ork Flow tasks on your behalt

This can get complicated, having to add providers for each category, and whether they can only view your items when you're gone or all the time. While it *can* be done individually, we recommend that this setup be done for everybody by clinic supervisors, if necessary with the assistance of the EHR Team. You can get fancy with this, but in the examples above we've kept

it simple: All Family Medicine providers are able to view tasks & PAQ items for each other, all the time.

The second alternative workflow is to employ Out Of Office Task Forwarding, a program modification we installed October 2014. To see how that works, review the mini-lesson "Out Of Office Tasking."