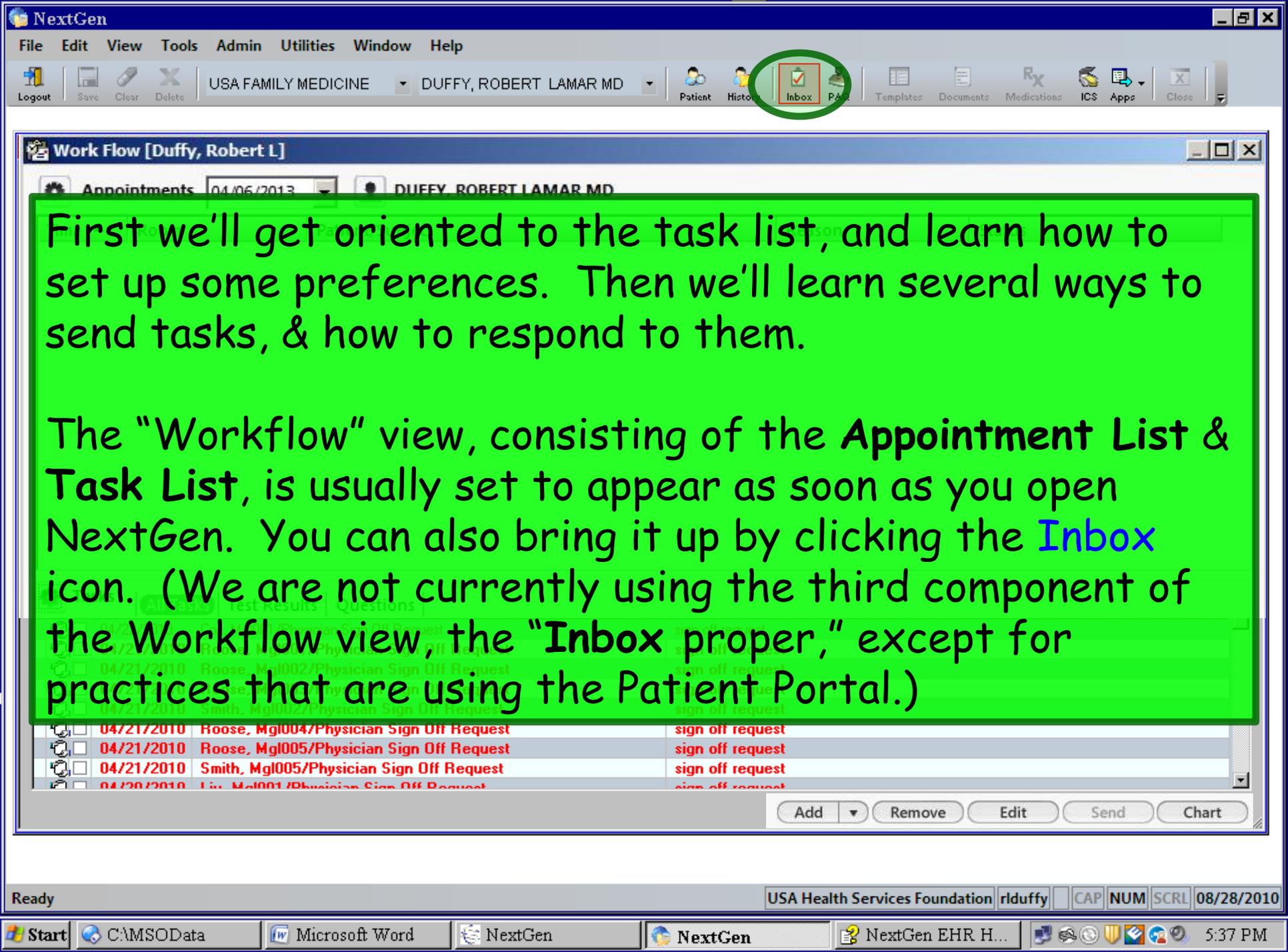


# NEXTGEN TASK DEMONSTRATION

This demonstration reviews how to send & respond to tasks, & will help you understand the task list. Tasking appears in different locations on different templates, but the principles are the same across all specialties.

This has been prepared for EHR 5.8 & KBM 8.3, but you may see some screen shots of earlier versions in the background when they are not germane to the point being illustrated. Subsequent updates may display cosmetic & functional changes.

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



Work Flow [Duffy, Robert L]

First we'll get oriented to the task list, and learn how to set up some preferences. Then we'll learn several ways to send tasks, & how to respond to them.

The "Workflow" view, consisting of the **Appointment List & Task List**, is usually set to appear as soon as you open NextGen. You can also bring it up by clicking the **Inbox** icon. (We are not currently using the third component of the Workflow view, the "Inbox proper," except for practices that are using the Patient Portal.)

<input type="checkbox"/>	04/21/2010	Roose, Mgl004/Physician Sign Off Request	sign off request
<input type="checkbox"/>	04/21/2010	Roose, Mgl005/Physician Sign Off Request	sign off request
<input type="checkbox"/>	04/21/2010	Smith, Mgl005/Physician Sign Off Request	sign off request
<input type="checkbox"/>	04/20/2010	Liu, Mgl001/Physician Sign Off Request	sign off request

Work Flow [Duffy, Robert L]

Appointments 04/06/2013 DUFFY, ROBERT LAMAR MD

Time ▲	Room	Patient/Subject	Reason	Status
--------	------	-----------------	--------	--------

There are several ways the user can choose to configure the Workflow view. We recommend having the appointment list on top, with the task list below; the full screen width allows more information to be viewable in each column. (If the Patient Portal is in use, users will need to employ one of the 3-pane views.)

To choose your configuration, right-click on the **Title Bar** at the top of the Workflow.

Work Flow [Duffy, Robert L]

Appointments 04/06/2013 DUFFY, ROBERT LAMAR

Time	Room	Patient/Subject	Status

Restore  
Move  
Size  
Minimize  
Maximize  
**X Close Alt+F4**  
Window Configuration...

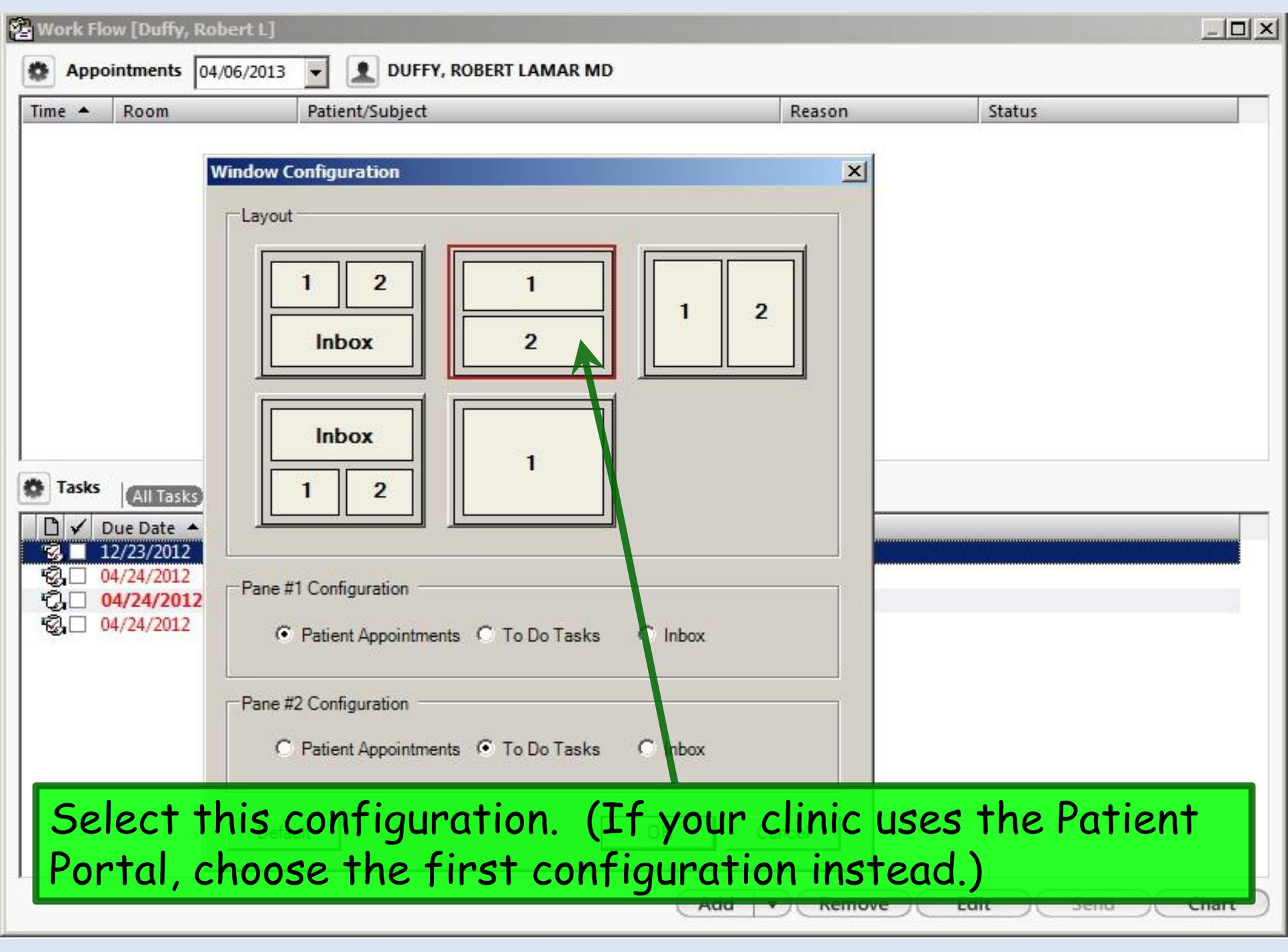
Click Window Configuration.

Tasks All Tasks Test Results Questions

!	☐	☑	Due Date	Patient/Subject	Description
☐	☐		04/22/2010	Cox, Mgl004/Physician Sign Off Request	sign off request
☐	☐		04/22/2010	Cox, Mgl005/Physician Sign Off Request	sign off request
!	☐		04/22/2010	Quagmire, Abigail A	Referral ordered
☐	☐		04/22/2010	Cox, Mgl001	Office Service(s) ordered
☐	☐		04/22/2010	Cox, Mgl001/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Roose, Mgl001/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Roose, Mgl002/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Roose, Mgl003/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Smith, Mgl002/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Roose, Mgl004/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Roose, Mgl005/Physician Sign Off Request	sign off request
☐	☐		04/21/2010	Smith, Mgl005/Physician Sign Off Request	sign off request
☐	☐		04/20/2010	Lin, Mgl001/Physician Sign Off Request	sign off request

Add Remove Edit Send Chart

New Task Delete Modify Send Chart



Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

### Window Configuration

Layout

Configuration 1: [1 | 2] [Inbox] [1 | 2]

Configuration 2: [1 | 2] [1]

Configuration 3: [1 | 2] [1]

Pane #1 Configuration

Patient Appointments  To Do Tasks  Inbox

Pane #2 Configuration

Patient Appointments  To Do Tasks  Inbox

Select this configuration. (If your clinic uses the Patient Portal, choose the first configuration instead.)

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

You can set several other preferences, & change viewed items on the fly, by clicking the **setup icon**.

<input type="checkbox"/>	Due Date	Patient/Subject	Description
<input checked="" type="checkbox"/>	12/23/2012	Quagmire, Solomon/Physician Sign Off Request	Sign off request
<input type="checkbox"/>	04/24/2012	[REDACTED]	
<input type="checkbox"/>	04/24/2012	[REDACTED]	
<input type="checkbox"/>	04/24/2012	[REDACTED]	

You can choose to view tasks that you've **Completed**, **Deleted**, or **Assigned to Someone Else** by clicking on these items.

Usually you'll want these unchecked, so that you'll only see tasks that have been assigned to you & are not yet completed. But sometimes these can be helpful when you're trying to track down a task you sent to someone else, or a task you've already taken care of.

The screenshot shows a software interface with a 'Tasks' menu. The menu is open, displaying several options. A green circle highlights the following options: 'Show Completed Tasks', 'Show Deleted Tasks', and 'Show Tasks Assigned To Someone Else'. A green arrow points from the text above to the 'Show Completed Tasks' option. The interface also shows a table with columns 'Description' and 'Sign off request'. At the bottom, there are buttons for 'Add', 'Remove', 'Edit', 'Send', and 'Chart'.

Description
on/Physician Sign Off Request
Sign off request

Buttons: Add, Remove, Edit, Send, Chart

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

You can manually Refresh your task list by clicking here.

Tasks All Tasks Test Results Questions

- <Refresh>
- Show Completed Tasks
- Show Deleted Tasks
- Show Tasks Assigned To Someone Else
- Out of Office Schedule...
- Setup Tabs...
- Preferences...
- View Tasks For

Description
on/Physician Sign Off Request

You can Setup Tabs by clicking here, though we're not actively using these at the time of this writing.

By default, you are viewing your own tasks.

You can **View Tasks For** other providers by clicking here. You would do this if you knew you needed to cover tasks for another provider who was out of the office.

This workflow may vary by department, & will not be further reviewed here.

The screenshot shows a software interface with a task list table and a dropdown menu. The table has columns for Due Date, Patient/Subject, and Description. The dropdown menu is open, showing a list of provider names with a checkmark next to '[Duffy, Robert L]'. The 'View Tasks For' option is highlighted in red.

Due Date	Patient/Subject	Description
04/22/2010	Cox, Mgl004/Physician Sign Off Request	sign off request
04/22/2010	Cox, Mgl005/Physician Sign Off Request	sign off request
04/22/2010	Quagmire, Abigail A	Referral ordered
04/22/2010	Cox, Mgl001	Office Service(s) ordered
04/22/2010	Cox, Mgl001/Physician Sign Off Request	sign off request
04/21/2010	Roose, Mgl001/Physician Sign Off Request	sign off request
04/21/2010	Roose, Mgl002/Physician Sign Off Request	sign off request
04/21/2010	Roose, Mgl003/Physician Sign Off Request	sign off request
04/21/2010	Smith, Mgl002/Physician Sign Off Request	sign
04/21/2010	Roose, Mgl004/Physician Sign Off Request	sign
04/21/2010	Roose, Mgl005/Physician Sign Off Request	sign
04/21/2010	Smith, Mgl005/Physician Sign Off Request	sign
04/20/2010	Liu, Mgl001/Physician Sign Off Request	sign

Dropdown Menu:

- Atkinson, Tangela
- ✓ [Duffy, Robert L]
- Linder, Michael
- Molokhia, Ehab A
- Motley, Carol
- Perkins, Allen
- Reddy, Shyla

View Tasks For

Appointments 04/06/2013 DUFFY, ROBERT LAMAR MD

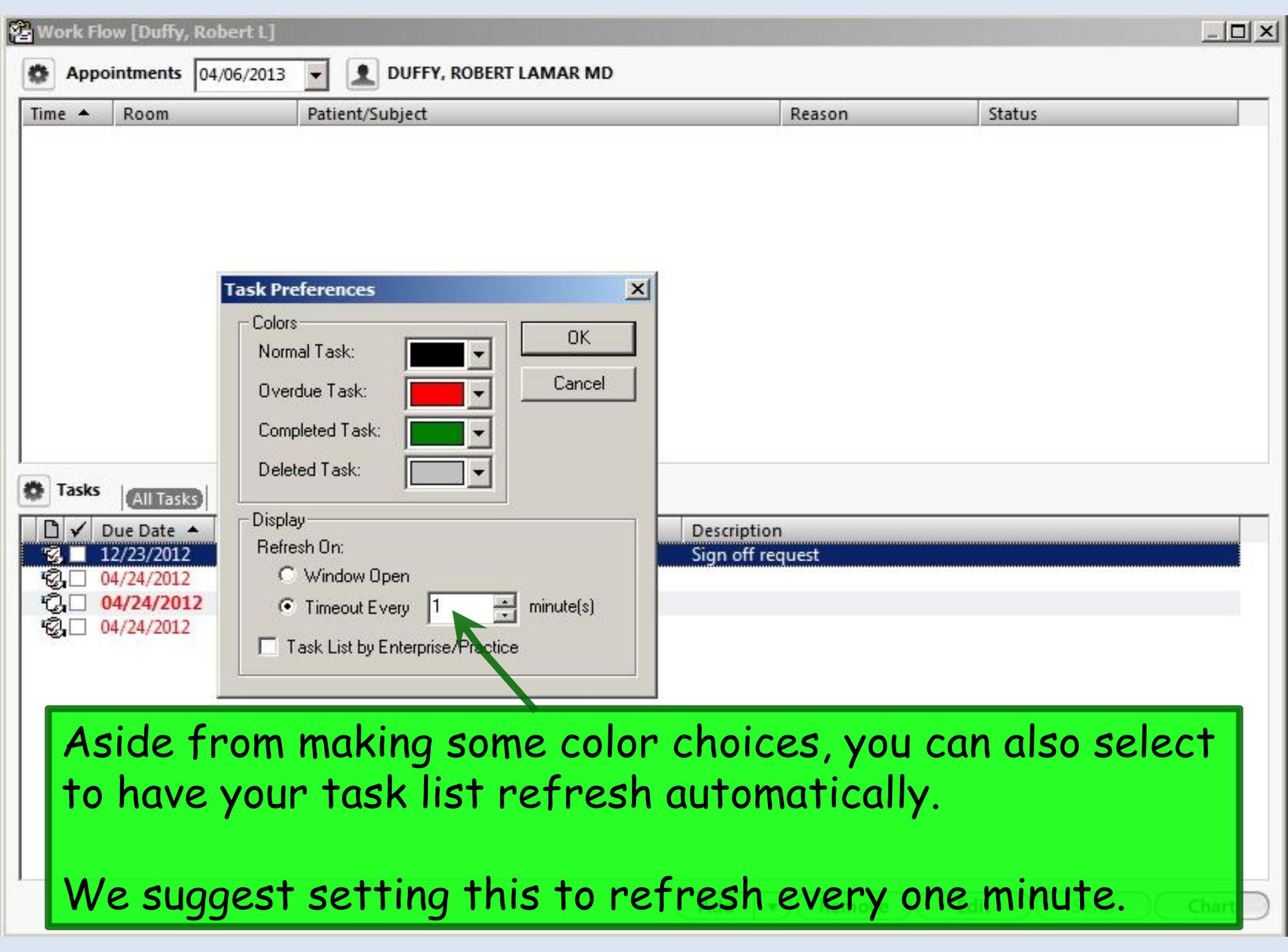
Time ▲	Room	Patient/Subject	Reason	Status
--------	------	-----------------	--------	--------

You can select several other Preferences by clicking here.

Tasks All Tasks Test Results Questions

- <Refresh>
- Show Completed Tasks
- Show Deleted Tasks
- Show Tasks Assigned To Someone Else
- Out of Office Schedule...
- Setup Tabs...
- Preferences...
- View Tasks For ▶

	Description
on/Physician Sign Off Request	Sign off request



Aside from making some color choices, you can also select to have your task list refresh automatically.

We suggest setting this to refresh every one minute.

Look at the columns on the left of the task list.

The first column indicates the task priority: low (↓), normal, or high (!). The program appears to assign normal or high priority at various places from which you generate tasks. While the user can often specify a priority, in practice most people accept the default priority.

Tasks All Tasks Refills Test Results Questions

<input type="checkbox"/>	<input type="checkbox"/>	Due Date ^	Patient/Subject	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/11/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input type="checkbox"/>	<input type="checkbox"/>	09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input type="checkbox"/>	<input type="checkbox"/>	07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
<input type="checkbox"/>	<input type="checkbox"/>	07/02/2013	WallacePractice, Example/Patient visit	stuff
<input type="checkbox"/>	<input type="checkbox"/>	07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
<input type="checkbox"/>	<input type="checkbox"/>	06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
<input type="checkbox"/>	<input type="checkbox"/>	06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test

Add Remove Edit Send Chart

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

The third column (✓) is the Completed column. You check this box when you've completed a task.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Due Date	Patient/Subject	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/11/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	WallacePractice, Example/Patient visit	stuff
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

The middle column tells you several other things about the task.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Due Date	Patient/Subject	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/11/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/02/2013	WallacePractice, Example/Patient visit	stuff
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
<input type="checkbox"/>	<input checked="" type="checkbox"/>	06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
<input type="checkbox"/>	<input checked="" type="checkbox"/>	06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test



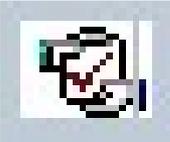
A clipboard with **one hand** indicates a task you've assigned to someone else.  
(Reminder: You toss a football with one hand.)



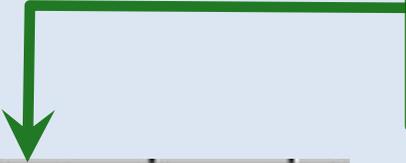
A clipboard with **two hands** indicates a task someone has assigned to you, or a workgroup that you belong to.  
(Reminder: You catch a football with two hands.)



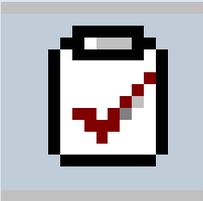
A clipboard with a **check mark** means that it has been accepted by somebody—either you, or another user.



Don't confuse this with the **check mark column**, which indicates that the task has been completed.



!		✓	Due Date ▾
↓		<input type="checkbox"/>	08/28/2010
		<input type="checkbox"/>	08/27/2010
		<input type="checkbox"/>	08/27/2010
		<input type="checkbox"/>	04/22/2010



The final icon you'll see has a check mark, but no hands. This is a system-generated task. Examples of this type of task are tasks that come across an interface (e.g., from a lab or pharmacy), or tasks you send to yourself. They are by default automatically accepted, & thus have the check mark.

There are several ways to create tasks. One of the most versatile is to use the **Tasking** button on the **Information Bar**.

NextGen EHR: Ashleigh Quagmire MRN: 000000007762 DOB: 01/02/1957 (Female) AGE: 57 years 1 month - 02/20/2014 09:22 AM : "\*USA Intake"

File Edit Default View Tools Admin Utilities Window Help

Logout Save Clear Delete USA FAMILY MEDICINE DUFFY, ROBERT LAMAR MD Patient History Inbox PAQ Medications EPM Templates Documents Images Orders Procedures Apps Close

Ashleigh Quagmire (F) DOB: 01/02/1957 (57 years) Weight: 150.20 lb (68.13 Kg) Allergies: (3) Problems: (3) Diagnoses: (18) Medications: (4)

Address: 123 Toejam Trace  
Mobile, AL 36604  
Contact: (251) 555-1234 (Home)

MRN: 000000007762  
Insurance: MEDICAID OF ALABAMA  
NextMD: No

Emergency Relation:  
Emergency Phone:  
Pharmacy 1: CAFFEYS PHARM...

PCP: ATKINSON, TANGELA C ...  
Referring:  
Rendering: DUFFY, ROBERT LAMAR ...

Alerts OBGYN Details Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

02/20/2014 09:22 AM : "\*USA Intake"

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

General

Established patient  New patient | Historian:

USAto Do

**Message**

Date Due: 04/06/2013 Priority: Normal

Subject: Category:

Message

OK Cancel

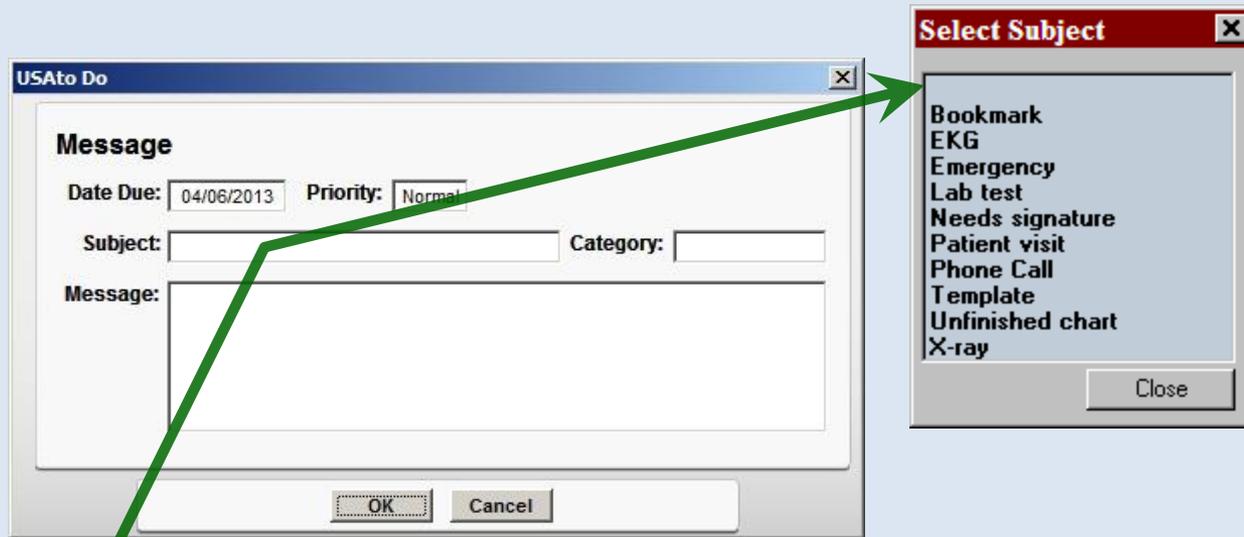
**TodoPriority**

High  
Low  
Normal

Close

When you click this button, a popup appears that begins the task process. By default, the **Date Due** will be today.

The default priority is usually **Normal**; you can click in that box to change it to **High** or **Low** if desired.



Click in the **Subject** box. You can select one of the popup subjects, or click the **blank** at the top of the list & type a subject of your own.

(As of this writing, we're not emphasizing the **Category** box, though that may change in the future.)

**USAto Do**

**Message**

Date Due: 04/06/2013 Priority: Normal

Subject: Lab test Category:

Message: See lipid panel results; please call & inform her.

OK Cancel

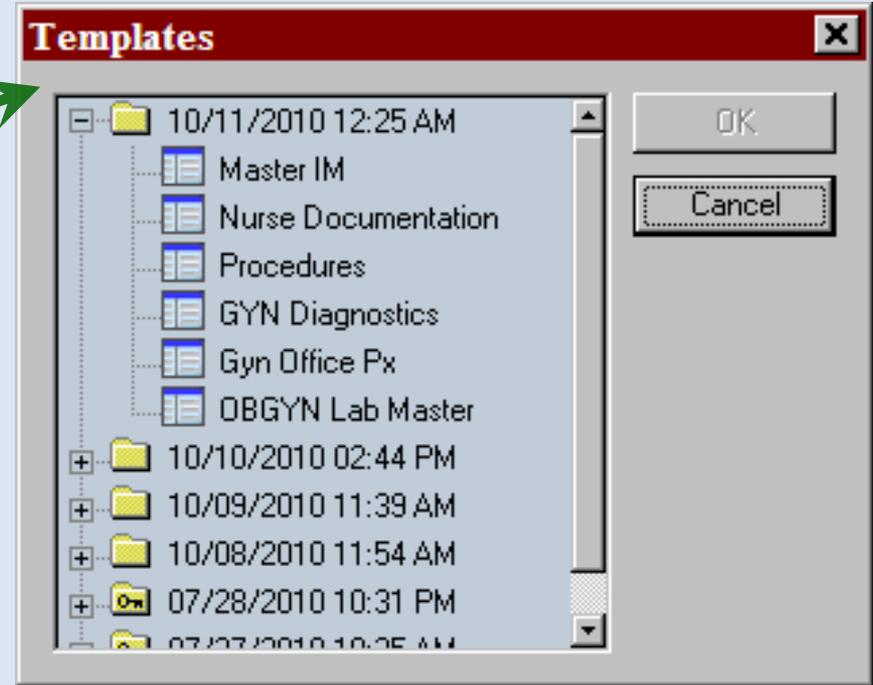
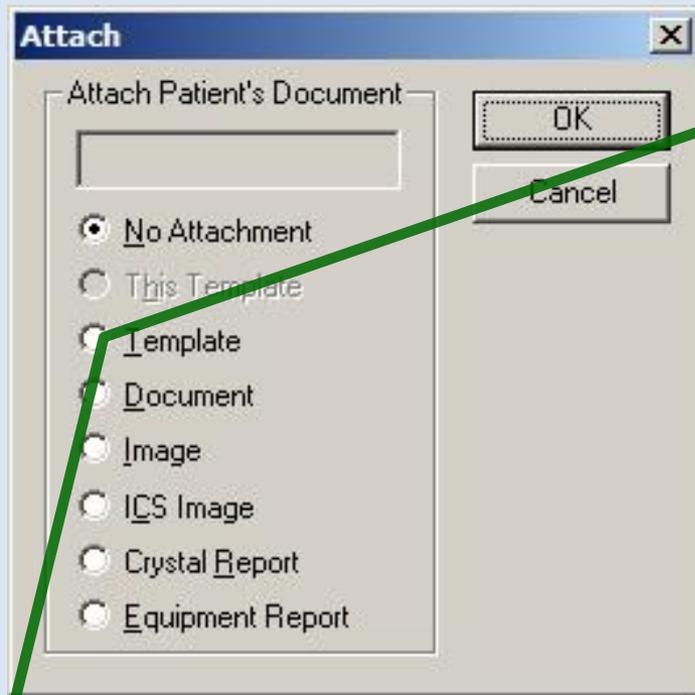
Click in the **Message** box & type a message to your recipient. Click **OK** when you're done.

As we'll see in a minute, it isn't absolutely necessary to use the **Subject** and **Message** boxes, but it makes things clearer for your recipient.

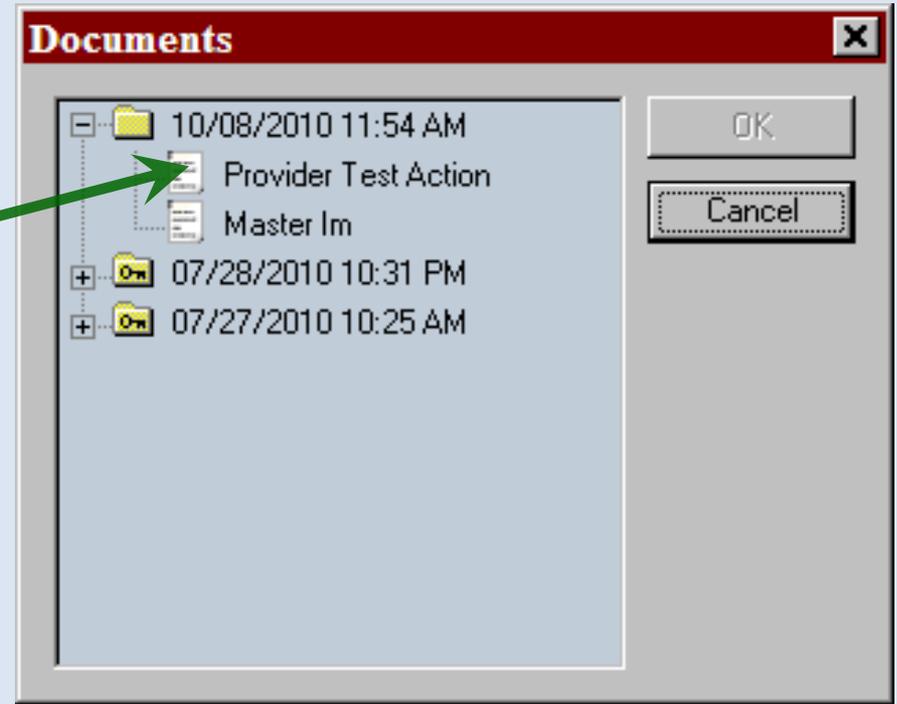
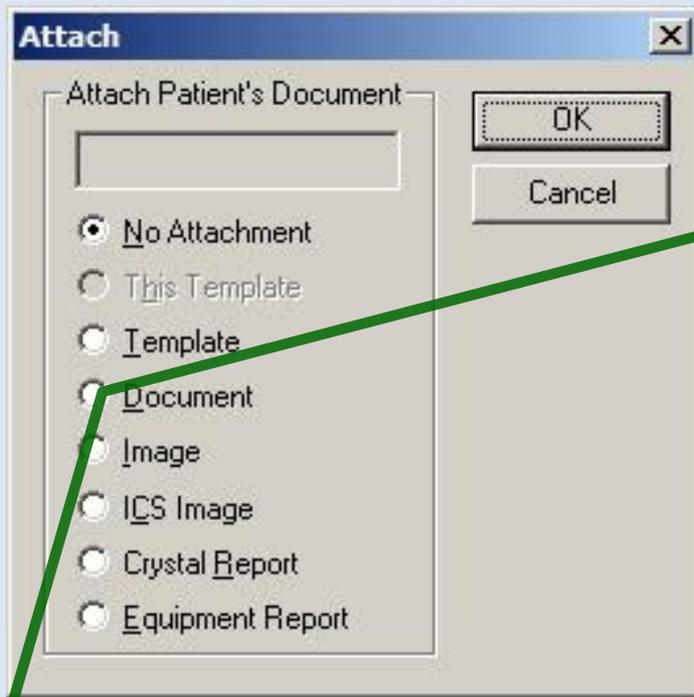


You have the opportunity to attach a component of the patient's chart (often a template or document) to the task. If you do this, when the recipient opens the task, the chart will open to that spot, making it easy to see what needs to be done.

You're not required to pick an attachment, but it is very helpful to do so. (And without it, your recipient may not be able to figure out what you want.)

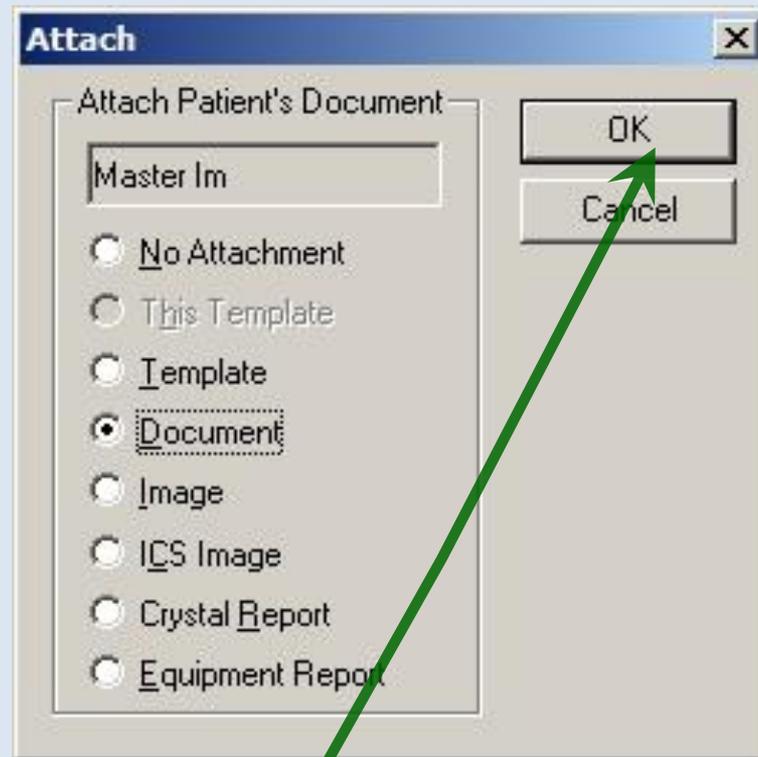


If you select **Template**, a popup will show available templates on the most recent encounter. You can also select templates from previous encounters.



If you select **Document**, a popup will show available documents on the most recent encounter. You can also select documents from previous encounters.

In this example, we'll select the **Provider Test Action** document, then click **OK**.



You're returned here; click **OK** again.





## Select Task Recipients

Available Users / Workgroups:



Priority:

Normal

Task Recipients:

Name

Type

- + FMC Attending Team (Attending Te
- + FMC Attendings (Physicians)
- + FMC Blue Team (Blue Team e-Rx R
- + FMC Front Office (Front Office)
- + FMC Green Team (Green Team e-R
- + FMC Medical Records (Medical Rec
- + **FMC Mid-Level (Mid-Level Providers)**
- + FMC Momcare Case Worker (Social
- FMC Nursing (Nurses)
  - Bell, Froncean H
  - Blakely, Djakarta
  - Clary, Frances
  - Edwards, Elizabeth E
  - Kelleu-McLaren, Julie

Add  
User(s)

Add  
Group(s)

Remove

Clear

Alternatively, you can add the entire workgroup by highlighting it & clicking **Add Group(s)**.

When you send a task to a workgroup, everyone in that group will see it. When one person completes it, it will show as completed for everybody.

You can adjust **Priority** if desired.

Select Task Recipients

Available Users / Workgroups:

- + FMC Attending Team (Attending Te
- + FMC Attendings (Physicians)
- + FMC Blue Team (Blue Team e-Rx R
- + FMC Front Office (Front Office)
- + FMC Green Team (Green Team e-R
- + FMC Medical Records (Medical Re
- + FMC Mid-Level (Mid-Level Provider
- + FMC Momcare Case Worker (Social
- FMC Nursing (Nurses)
  - Bell, Froncean H
  - Blakely, Djakarta
  - Clary, Frances
  - Edwards, Elizabeth E
  - Kelley-McLaren, Julie
  - McMillan, Renetta
  - Means, Camela
  - Rankin, Jonnita
  - Spears, Keona

Priority: Normal

Add User(s)

Add Group(s)

Remove

Clear

Task Recipients:

Name	Type
FMC Nursing (Nurses)	Group

New Group Delete Modify OK Cancel

Click **OK** & your task is sent.

**Document Name:** Provider Test Action  
**Patient Name:** Felicia Quagmire  
**Practice:** USA FAMILY MEDICINE  
**Current Provider:** ROBERT LAMAR DUFFY MD  
**Encounter Date:** 10/08/2010 11:54 AM  
**Primary Care Physician:**

When the recipient opens the task, the chosen document displays.

Date	Time	Employee	Comments
10/22/2010	10:34 AM	Robert L. Duffy	Lipid panel received. Doing well on current simvastatin.
			Continue current dose, & recheck in 6 mos. completed by Robert L. Duffy

Provider: ROBERT LAMAR DUFFY MD 10/22/2010 10:35 AM

Document generated by: Robert L. Duffy 10/22/2010 10:35 AM

# Medical Question - Telephone

## Call Information:

Contact type:  Time of call:  Date of call:

Spoke with:  Patient Name:  Relationship:

Urgency:

## Communication:

Concern:  Duration of symptoms:

Comment:

Meds/Allergies/Chronic Probs

Manage My Phrases

My Phrases

Review of Test(s)

## This Communication History:

Date	Time	Employee	Comments	Tasked To
06/02/2013	4:23 PM	Robert L. Duffy	Pt wants to know if she should stop her aspirin before going to dentist Friday.	

Telephone Call Summary

## Tasking:

Priority:

Send & Close

Status:  Open  Complete

Save & Close

Cancel

Another way to send a task is from within a template or popup itself. Here a staff member has taken a question on the phone, & needs to task it to a nurse or provider. After documenting the question, click **Send & Close**.



Specialty ▾ Family Practice

Visit Type ▾ Office Visit



Intake

Histories

SOAP

Finalize

Checkout

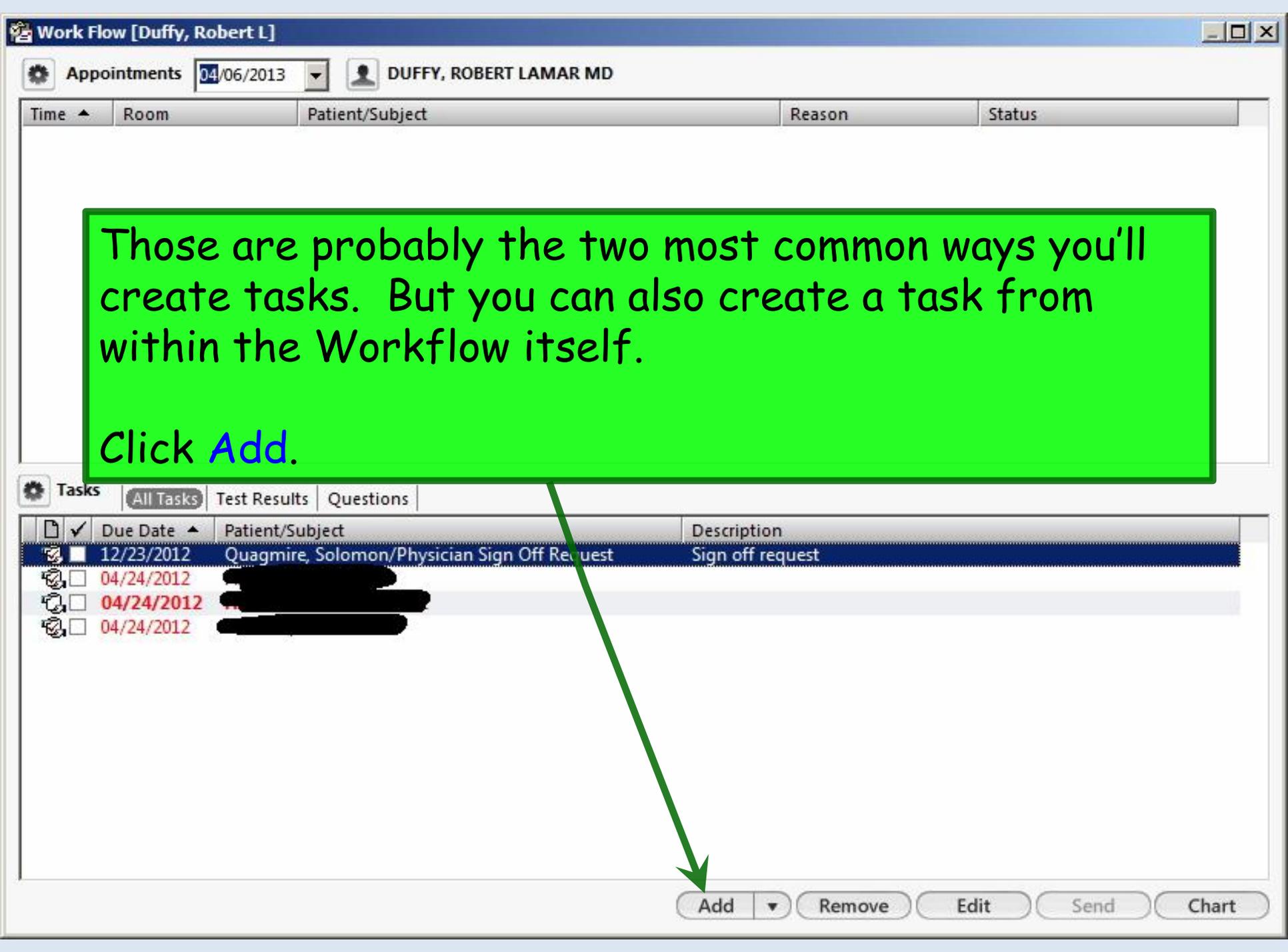
[Care Guidelines](#)[Global Days](#) [Comments](#)[Patient Contact Info](#)[View Scheduled Appointments](#)[Telephone Call Summary](#)

PCP: ROBERT DUFFY

Panel Control: [Toggle](#) [Cycle](#) **Important:** *Generate document after every entry* [Generate Document](#)**Communication:** [Clinic Memos / Other Notes](#)[Medication Management](#)[Test Result Request](#)[Forms/Records](#)[Medical Question](#)[Referral Request](#)[Billing Question](#)[Outgoing Call](#)Communications: Display:   Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/13/2014	9:02 AM	Comment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next.	Robert L. Duffy	Christopher Bowen	Medical Question
06/13/2014	8:59 AM	Comment:There was a fax in my box from medical supply company about a scooter prescription. Please ask the patient if she really asked for this, or if it was one of those "cold call" faxes directly from the company..	Robert L. Duffy	Misti Smith	Other

Note that you didn't have to select an attachment. Since the task was originated from within a template, the recipient will be taken to that template upon opening the task, where the question is immediately apparent.



Those are probably the two most common ways you'll create tasks. But you can also create a task from within the Workflow itself.

Click [Add](#).

Tasks **All Tasks** Test Results Questions

<input type="checkbox"/>	Due Date	Patient/Subject	Description
<input checked="" type="checkbox"/>	12/23/2012	Quagmire, Solomon	Physician Sign Off Request Sign off request
<input type="checkbox"/>	04/24/2012	[REDACTED]	[REDACTED]
<input type="checkbox"/>	04/24/2012	[REDACTED]	[REDACTED]
<input type="checkbox"/>	04/24/2012	[REDACTED]	[REDACTED]

Add Remove Edit Send Chart

You can assign a **Due Date**, **Priority**, & type a **Subject** & **Description**, similar to above.

**New Task** AMAR MD

Due Date: 8/28/2010

Priority: Normal  Completed

Subject: Lipid panel

Description: Please make sure he's notified about the lipid panel.

Assigned:  Assign To...

Patient:  Select...

Attach:

Task Categories

**Select Task Recipients**

Available Users / Workgroups:

- Favorites
- Workgroups
  - SHAC (radiology)
  - Boys Group (BG)
  - EHR fav (test group)
  - Family Practice Phone Room (Phone)
  - FM Attendings (Family Medicine Att)
  - FM Referral Office (Family Medicine)
  - FM Residents (Family Medicine Res)
  - FMC Clinical Students (PA/NP)
  - FMC Nursing (Nurses)
  - FMC Triage (test)
  - Test Group (Test)
- All Users
- USA Health Services Foundation
  - Abernathy, Durant
  - Abston, Chandra M
  - Admin, NEXTGEN
  - Annetinelli, Alisa L

Task Recipients:

Name	Type
------	------

08/27/2010 Duffyr, Example001k/Physician Sign Off Re  
08/25/2010 Test, Lisa/Lab Results  
08/25/2010 Test, Mom/Lab Results  
08/25/2010 Test, Mat/Lab Results  
08/24/2010 Test, M/Lab Results  
08/24/2010 Test, Lisa/Lab Results  
08/24/2010 Test, Mat/Lab Results  
08/24/2010 Test, De  
08/23/2010 Test, M

New Task  Delete  Modify  Send  Chart

The familiar recipient selection popup appears when you click **Assign To**.

Work Flow [Duffy, Robert L]

**New Task**

Due Date: 8/28/2010

Priority: Normal  Completed

Subject: Lipid panel

Description: Please make sure he's notified about the lipid panel.

Assigned: Anderson, Brenda; Assign To...

Patient: Select...

Attach:

Task Categories Add Cancel

<input type="checkbox"/>	08/27/2010	Duffy, Example001k/Physician Sign
<input checked="" type="checkbox"/>	08/25/2010	Test, Lisa/Lab Results
<input checked="" type="checkbox"/>	08/25/2010	Test, Mom/Lab Results
<input checked="" type="checkbox"/>	08/25/2010	Test, Matt/Lab Results
<input checked="" type="checkbox"/>	08/24/2010	Test, Mom/Lab Results
<input checked="" type="checkbox"/>	08/24/2010	Test, Lisa/Lab Results
<input checked="" type="checkbox"/>	08/24/2010	Test, Matt/Lab Results
<input checked="" type="checkbox"/>	08/24/2010	Test, Dee dee/Lab Results
<input checked="" type="checkbox"/>	08/23/2010	Test, Mom/Lab Results

From the workflow, we have the additional step of selecting the patient by clicking **Select**.

Note that a task could also be sent about a general question, & not associated with a patient. But since most tasks will reference a patient, it is much easier on the recipient if you attach a patient. And there is no direct way for the recipient to respond to you if you just send a question without a patient attached.

Bottom line: **ALWAYS** attach the patient in question.



Work Flow [Duffy, Robert L]

New Task

Double-click on the patient's name when it appears.

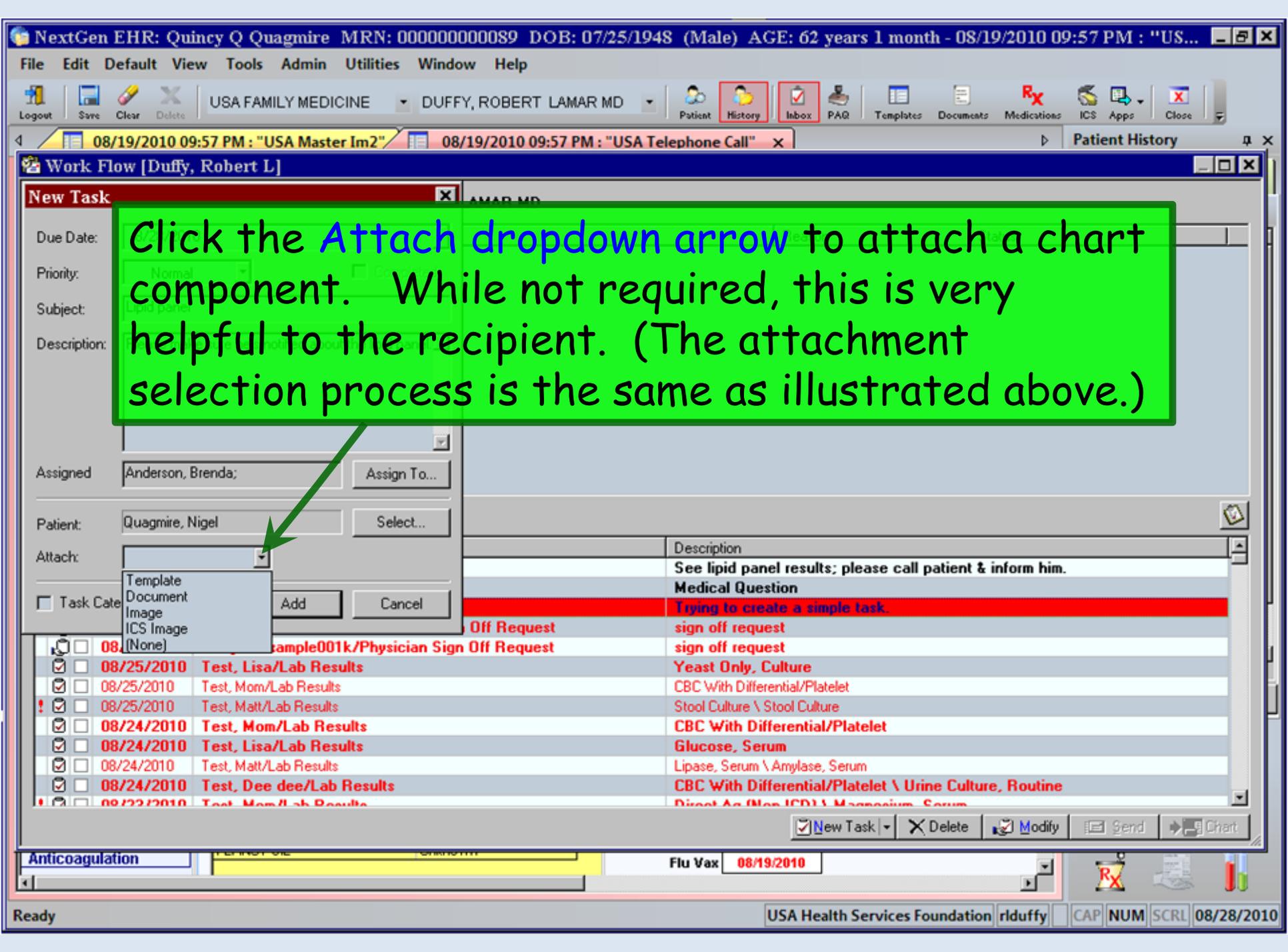
Due Date: Priority: Normal Subject: Patient Lookup

Description: Search Criteria  
Last: Quagmire First / Nickname: Nigel Middle: Previous Last: City: Address Line 1: Zip: Social Security: Birth Date: Sex: Home Phone: Search By: Med Rec Nbr: Policy Nbr: Enc Nbr  
View By: All Patients External System: External ID: Exclude Expired Patients  
Patient: Birth Date: L4DSSN

Matching Records

Name	Nickname	Address	Sex	Birth Dt	SS Nbr
Quagmire, Nigel		SkipToMyLoo Mobile, A...	Male	02/01/1961	

Records Found: 1



Click the **Attach dropdown arrow** to attach a chart component. While not required, this is very helpful to the recipient. (The attachment selection process is the same as illustrated above.)

Assigned: Anderson, Brenda; Assign To...  
Patient: Quagmire, Nigel Select...  
Attach: [dropdown arrow]  
 Task Date Add Cancel

	Description
	See lipid panel results; please call patient & inform him.
	Medical Question
	Trying to create a simple task.
	Off Request
	sign off request
	sign off request
	Yeast Only, Culture
	CBC With Differential/Platelet
	Stool Culture \ Stool Culture
	CBC With Differential/Platelet
	Glucose, Serum
	Lipase, Serum \ Amylase, Serum
	CBC With Differential/Platelet \ Urine Culture, Routine
	Direct Ag (Max ICD) Magnesium, Serum

New Task  Delete  Modify  Send  Chat



Now let's look at responding to a task.

Users are often confused about the concept of "accepting" a task, when they may not recognize the patient's name, & it may not be clear from the subject line just what the question is. For example, maybe I don't remember Quincy Quagmire, & all we can see from here is that someone took a call from him.

		Line	Room	Patient/Subject	Reason	Status	Provider	Description
!	<input type="checkbox"/>	08/28/2010		Quagmire, Quincy Q/Phone call				Medical Question
	<input type="checkbox"/>	04/21/2010		Smith, Mgl005/Physician Sign Off Request				sign off request
	<input type="checkbox"/>	04/22/2010		Cox, Mgl001/Physician Sign Off Request				sign off request
	<input type="checkbox"/>	04/21/2010		Roose, Mgl001/Physician Sign Off Request				sign off request
	<input type="checkbox"/>	04/21/2010		Roose, Mgl002/Physician Sign Off Request				sign off request
	<input type="checkbox"/>	04/21/2010		Roose, Mgl003/Physician Sign Off Request				sign off request

Think of it this way. Your nurse is handing you a paper chart with a sticky note on the front saying "phone call." You take the chart, or accept it from her, open the chart & confirm it's your patient. You then read the phone message, review the chart, & answer the question. If you decide it's not your patient, you give it back to her, or give it to the correct provider.

Appointments 04/06/2013 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

Tasks All Tasks Test Results Questions

Due Date	Patient/Subject	Description
04/22/2010	Cox, Mgl005/Physician Sign Off Request	sign off request
08/28/2010	Quagmire, Quincy Q/Phone call	Medical Question
04/21/2010	Smith, Mgl005/Physician Sign Off Request	sign off request
04/22/2010	Cox, Mgl001/Physician Sign Off Request	sign off request
04/21/2010	Roose, Mgl001/Physician Sign Off Request	sign off request
04/22/2010	Roose, Mgl002/Physician Sign Off Request	sign off request
04/22/2010	Smith, Mgl005/Physician Sign Off Request	sign off request
04/21/2010	Roose, Mgl001/Physician Sign Off Request	sign off request
04/21/2010	Cox, Mgl005/Physician Sign Off Request	sign off request
04/20/2010	Liu, Mgl001/Physician Sign Off Request	sign off request
04/20/2010	Laverne, Mgl001/Physician Sign Off Request	sign off request

In this example, we'll accept the Phone call task on Mr. Quagmire. There are 5 (yes, 5) ways to begin.

- 1) Double-click on the task.
- 2) Right-click on the task & choose **Edit**.
- 3) Highlight the task & click the **Edit** button.
- 4) Right-click on the task & choose **Go to the Patient's chart**.
- 5) Highlight the task & click the **Chart** button.

Due Date	Patient/Subject	Description
12/23/2012	Quangre, Solomon /Physician Sign Off Request	Sign off request
04/24/2012	Open Patient's Template	
04/24/2012	H Edit...	
04/24/2012	B	

Since we need to go to the patient's chart eventually, anyway, options 4) & 5) probably make the most sense.

## Task Details



Due Date:

8/27/2010



Priority:

Normal



Completed

Subject:

Phone call

Description:

Medical Question



Click **ACCEPT**.

Assigned by:

Jane Smith

REASSIGN...

Patient:

Quagnire, Quincy Q

Select...

Attach:

Template

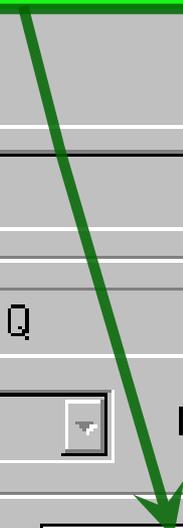


USA\_telephone\_call

Task Categories

ACCEPT

DECLINE



You are taken to the telephone template, where you see the question. Let's say you either recall the encounter, or review your last note, & you told him to come back in 3 months.

06/11/2014 11:51 AM : "USA Phone & Clinic Memos 836" x  
Specialty ▾ Family Practice Visit Type ▾ Office Visit  
Intake Histories

Care Guidelines | Global Days + Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: ROBERT DUFFY

Important: Generate document after every entry  Generate Document

Communication:

Clinic Memos / Other Notes Medication Management Test Result Request Forms/Records  
Medical Question Referral Request Billing Question Outgoing Call

Communications: Display:  Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/13/2014	9:02 AM	Comment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next.	Robert L. Duffy	Christopher Bowen	Medical Question
06/13/2014	8:59 AM	Comment:There was a fax in my box from medical supply company about a scooter prescription. Please ask the patient if she really asked for this, or if it was one of those "cold call" faxes directly from the company..	Robert L. Duffy	Misti Smith	Other

You note the Reason for call is Medical Question, so to respond, click Medical Question (though in reality you can choose any of the popups you like).

You're responding to a task, so change **Contact type** to **Task response** (though specifying a contact type isn't absolutely necessary).

Type your response. You could click **Reply & Close** to reply to the person who sent you the task, or click **Send & Close** to send it to someone else.

Medical Question - Telephone

Call Information:

Contact type:

Task response

Urgency:

Date of call: 06/13/2014

Time of call: 9:00 AM

After hours

Communication:

Concern:

Comment:

Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Next visit in 3 months; please let pt know.

Meds/Allergies/Chronic Probs

Review of Test(s)

- Schedule appointment:
- Send referral:
- Place new medication order:
- Adjust medication:
- Send test result(s):
- Counsel patient:
- Other:

Details:	Completed:
<input type="checkbox"/>	<input type="checkbox"/>

Admin Action Release of Info Log (PHI)

Tasking:

Priority:

Normal

Send & Close

Reply & Close

Reply to: Thomas McFaden

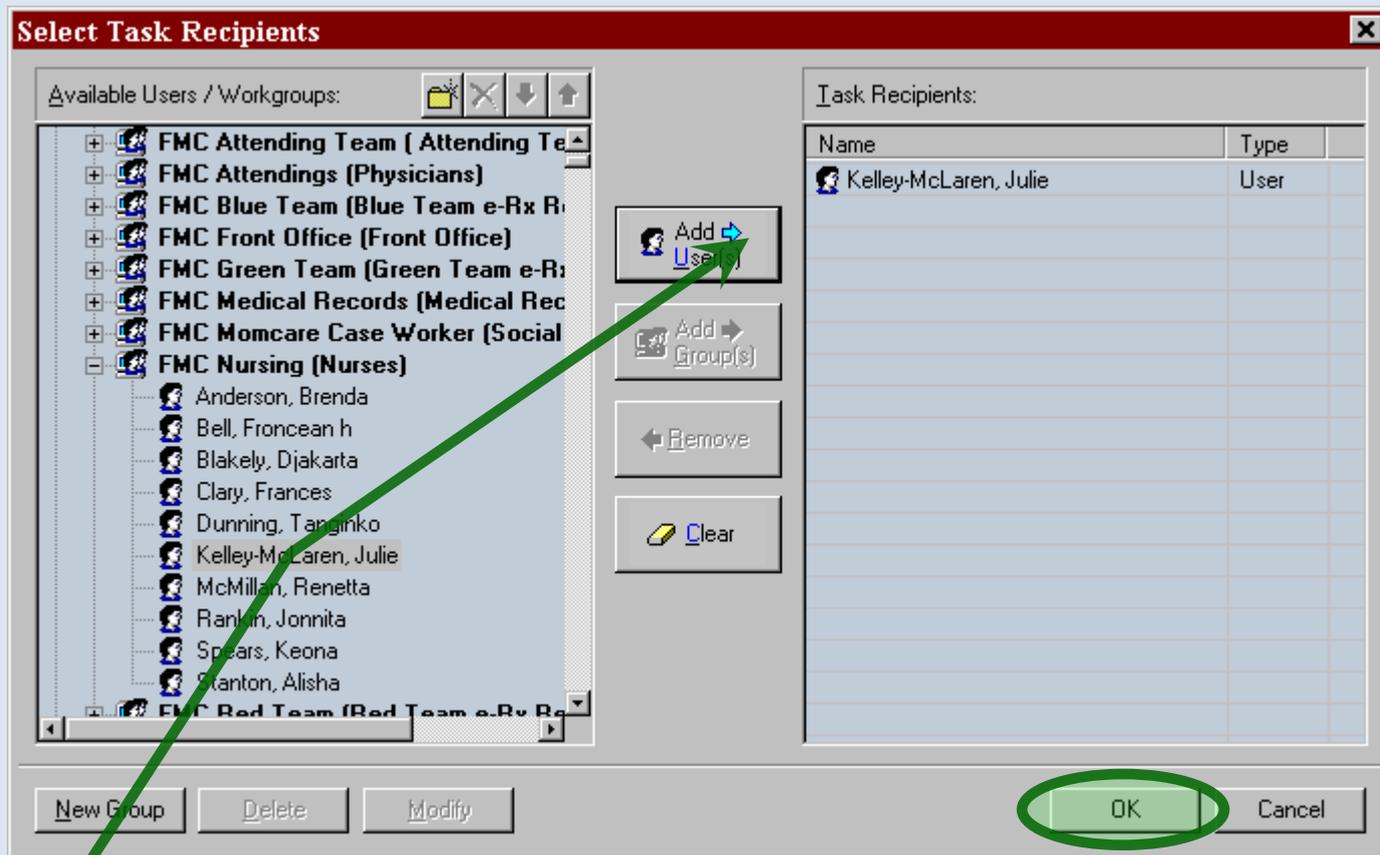
Status:  Open  Complete

This Communication History:

Date	Time	Concerns/Issues	Comments	Employee	Ta
06/13/2014	9:02 AM		Comment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next.	Robert L. Duffy	Cl B

Telephone Call Summary

Save & Close Cancel



If you chose **Send & Close** in the previous step, select your recipient & click **OK** to send the task.

When your nurse receives the task, she will be taken to the telephone template, where she will see your instructions.

Your response is added to the grid.

06/11/2014 11:51 AM : "USA Phone & Clinic Memos 836" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Care Guidelines Global Days Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: ROBERT DUFFY

Panel Control: Toggle Cycle

**Important: Generate document after every entry**  **Generate Document**

Communication:

Clinic Memos / Other Notes Medication Management Test Result Request Forms/Records  
Medical Question Referral Request Billing Question Outgoing Call

Communications: Display:   Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/13/2014	9:14 AM	Comment:Next visit in 3 months; please let pt know.	Robert L. Duffy	Christopher Bowen	Medical Question
06/13/2014	9:02 AM	Comment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next.	Robert L. Duffy	Christopher Bowen	Medical Question
06/13/2014	8:59 AM	Comment:There was a fax in my box from medical supply company about a scooter prescription. Please ask the patient if she really asked for this, or if it was one of those "cold call" faxes directly from the company..	Robert L. Duffy	Misti Smith	Other

Click the **Generate Note** button to generate a brief document summarizing this sequence of calls. (Every time someone adds an entry, the document will be re-generated, so that it will include the latest entries.)

The phone note is generated.  
Why generate a note, when the information is visible in the template, you may ask?

For one thing, if you have to create a paper copy of the chart, this will make the documentation available.  
For another, in the future, if a major upgrade changes the working templates, the note will still exist.

06/02/2013 03:29 PM : Document "TelephoneNotesAndClinicMemos" X

100% [L] [A] [S] X<sub>2</sub> X<sup>2</sup>

Date of Birth 0 [REDACTED]

PCP: FM-Duffy  
GYN: USA GYN Bodie

## Telephone Note and Clinic Memo Hist

Date	Time	Notes		
06/04/2013	10:14:04	Next visit in 3 months; please let him know.		
06/04/2013	09:17:11	Pt doesn't know when next appt should be. Please advise.		
06/02/2013	17:18:08	Use this space for other entries when you just need "A place to type." Maybe you saw the patient in the ER & just need to leave a brief note on the chart. Maybe you want to leave a "note to self."	Robert L. Duffy	Clinic Notes/Other
06/02/2013	16:47:57	Pt wants to know if she should stop her aspirin before going to dentist Friday.	Robert L. Duffy	Medical Question
06/02/2013	15:27:31	Sample note.	Robert L. Duffy	Clinic Notes/Other

This task is complete.  
Click **Inbox** to return to your task list.

Appointments   

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

Click the box in the Completed column to indicate that this task is complete.

 Tasks    

<input type="checkbox"/>	<input type="checkbox"/>	Due Date	Patient/Subject	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/20/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	WallacePractice, Example/Patient visit	stuff
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

A check mark appears in the Completed box.

Unless you've chosen to display your completed tasks, this task will disappear from your list the next time it is refreshed, usually within a minute.

Due Date	Patient/Subject	Description
<input checked="" type="checkbox"/> 10/11/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input checked="" type="checkbox"/> 09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
<input type="checkbox"/> 08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
<input type="checkbox"/> 08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
<input type="checkbox"/> 08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
<input type="checkbox"/> 08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
<input type="checkbox"/> 08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
<input type="checkbox"/> 07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input type="checkbox"/> 07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
<input type="checkbox"/> 07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
<input type="checkbox"/> 07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input type="checkbox"/> 07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
<input type="checkbox"/> 07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
<input type="checkbox"/> 07/02/2013	WallacePractice, Example/Patient visit	stuff
<input type="checkbox"/> 07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
<input type="checkbox"/> 06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
<input type="checkbox"/> 06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
<input type="checkbox"/> 06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
<input type="checkbox"/> 06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test

Perhaps you're thinking "That's all well & good if it really was my patient. But what if I look at the chart & find the patient really belongs to one of my colleagues, & the question should've really been directed to him. I've accepted the task, so now I'm stuck with it."

Due Date	Patient/Subject	Description
10/11/2013	AAATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
08/30/2013	AAATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
08/29/2013	AAATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
08/29/2013	AAATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
08/28/2013	AAATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
08/27/2013	AAATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
07/29/2013	AAATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
07/29/2013	AAATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...

Not a problem. Let's say you discover that the task should go to Dr. Johnson, who is in the office today. Return to your task list & modify the task by one of the methods previously shown; double-clicking it is often simplest.

## Task Details



Due Date:

8/27/2010

Priority:

Normal

Completed

Subject:

Phone call

Description:

Medical Question

Click REASSIGN.

Assigned by:

Jane Smith

REASSIGN...

Patient:

Quagnire, Quincy Q

Select...

Attach:

Template

USA\_telephone\_call

Task Categories

Update

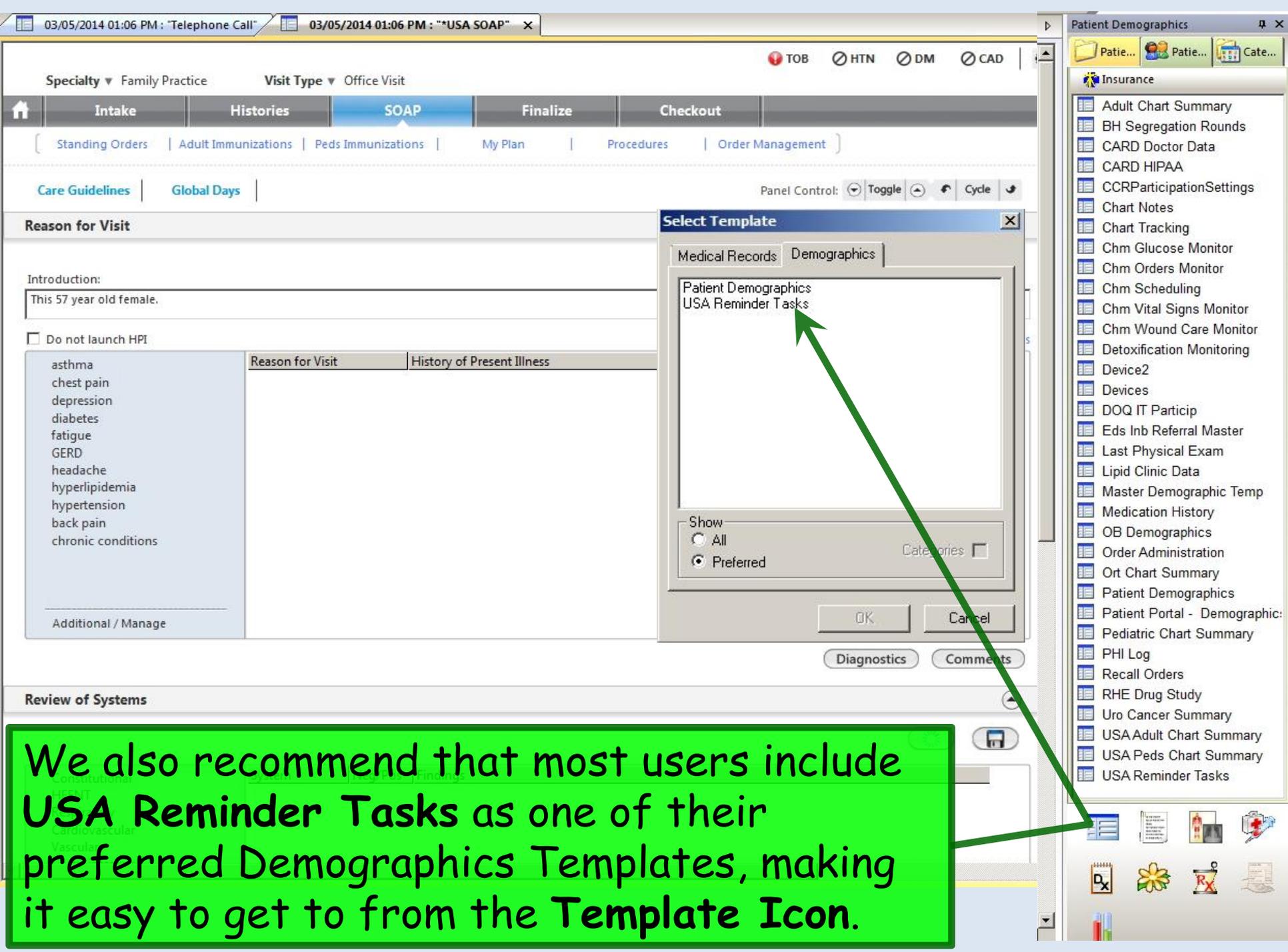
Cancel



# 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.





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**.

### Reminder Tasks

Reminder Recipient (can be yourself):

Reminder Date:  Months from Now  
 1  2  3  4  5  6  9

Topic/Description:  Details/Comments:

**Bd Dbpl Tasking Ids Rev 2**

Name
Dixon, Arlene
Dixon, Sibil
Dodd, Deonna
Donald, Beverly
Donson, Tranasha
Dortch, Shandra
Dortch, Shandra
Douglas, Edna
Douglas, Regina
Dragotta, Laura
Drinkard, Cammie
Driver, Tiffany
Dudeck, Amanda
Duffy, Kristina
<b>Duffy, Robert</b>
Duggar, Angela
Dupont, Brian
Durick, Stephen
Duess, Diane

Refresh OK Cancel

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.

ion to copy existing order

Reminder Recipient	Completed By	Ordered By	Date Ordered

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):

Reminder Date:  **Months from Now**  
 1  2  3  4  5  6  9  12

Topic/Description:

Click to send reminder task:

### Existing Reminder Tasks

Display  all  uncompleted  completed

Due Date	Topic/Description	Details/C

Recall Date

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

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

05/26/2013 11:18 AM: \*\*USA Finalize\* USA Reminder Tasks X

## Reminder Tasks

Reminder Recipient (can be yourself):

Reminder Date:  Months from Now  
 1  2  3  4  5  6  9  12  
(Date you wish reminder to be received)

Topic/Description:  Details/Comments:

Click to send reminder task:

Patient's Next Appointment

### 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**.

The Reminder Task is added to the grid.

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

## Reminder Tasks

Save & Close

Reminder Recipient (can be yourself):

Months from Now  
Reminder Date:   1  2  3  4  5  6  9  12  
(Date you wish reminder to be received)

Topic/Description:  Details/Comments:

Click to send reminder task:

Patient's Next Appointment

### 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
06/04/2013	Chest CT	If haven't gotten chest CT report by this date, make sure he had it done, & look for report.	Duffy, Robert		Robert L. Duffy	06/04/2013

When done click Save & Close.

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 X

### Reminder Tasks Save & Close

Reminder Recipient (can be yourself):

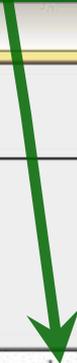
Months from Now

Reminder Date:   1  2  3  4  5  6  9  12  
(Date you wish reminder to be received)

Topic/Description:  Details/Comments:

Click to send reminder task:

Patient's Next Appointment



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

The screenshot shows a software interface with a 'Work Flow' window. The 'Tasks' tab is active, displaying a list of tasks. A 'Task Details' popup window is open, showing details for a task with a due date of 6/4/2013, priority of Normal, and subject of Recall. The 'ACCEPT' button in the popup is highlighted with a green arrow.

Due Date	Patient/Subject	Description
06/04/2013	AATestRLDAdu...	Chest CT
06/04/2013	[REDACTED]	Test of reminders a...
05/26/2013	AATestRLDAdu...	Sign off request
05/25/2013	AATestRLDAdu...	Sign off request
05/21/2013	AATestRLDInfan...	Sign off request
05/19/2013	AATestRLDChil...	Sign off request
05/19/2013	AATestRLDChil...	Sign off request
05/14/2013	[REDACTED]	Sign off request
05/14/2013	[REDACTED]	Sign off request
03/30/2013	[REDACTED]	TSH

Task Details:

- Due Date: 6/4/2013
- Priority: Normal
- Subject: Recall
- Description: Chest CT
- Assigned by: NEXTGEN Admin
- Patient: AATestRLDAdultMale, CCCCC
- Attach: Template, dm\_recall
- Buttons: ACCEPT, DECLINE

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

The Reminder Template (or a variant thereof called Recall Orders) opens.

Recall Orders x

## Recall Orders

Save & Close

### Add a Recall Order

Months from Now  
Recall Date   1  2  3  4  5  6  9  12

Event  Event Comments

favorites  all

Responsible Party

Patient's Next Appointment

### 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	06/04/2013

For further details, click the [line](#) on the grid.

# Reminder/Recall Item

By

Ordered

Completed

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

## Order Details

Topic/Description

Reminder Date

favorites  all

Reminder Recipient

Details/Comments

## Completion Details

Completion Comments

Reminder Task Sent

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

# Reminder/Recall Item

	By	Date	Time
<input checked="" type="checkbox"/> Ordered	Robert L. Duffy	06/04/2013	12:47 AM
<input checked="" type="checkbox"/> Completed	Robert L. Duffy	06/04/2013	12:54 PM

## Order Details

Topic/Description

Reminder Date

favorites  all

Reminder Recipient

Details/Comments

## Completion Details

Completion Comments

Reminder Task Sent

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

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

In Summary—  
 There are multiple variations of how the task list can be used, which will likely vary from clinic to clinic, depending upon clinic workflow and policies. But these examples should give you enough pointers to handle most tasks you'll commonly encounter.

Due Date	Patient/Subject	Description
10/11/2013	AATestRLD, QuinellaGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
09/09/2013	AaTest, Adam/Physician Sign Off Request	Sign off request
08/30/2013	AATestRLD, PaulineGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B...
08/29/2013	AATestRLD, MaggieGT/Lab Results	Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas...
08/29/2013	AATestRLD, OtisGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri...
08/28/2013	AATestRLD, LarryGT/Lab Results	Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC
08/27/2013	AATestRLD, NellGT/Lab Results	Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment
07/29/2013	AATestRLD, GertrudeGT/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
07/29/2013	AATestRLD, GertrudeGT/Lab Order Error	Unable to find insurance info for order number: PRO45682! Insurance is required for third...
07/22/2013	AATestRLDAdultFemale, AAAAA/Recall	M'gram
07/02/2013	DuffyPractice, Example/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
07/02/2013	DuffyPractice, Example/Lab Order Error	Unable to find insurance info for order number: PRO45671! Insurance is required for third...
07/02/2013	LamPractice, Example/need urine sample	random drug screen on all my employees
07/02/2013	WallacePractice, Example/Patient visit	stuff
07/02/2013	IslamPractice, Example/Sample Subject	Saw your patient in ER last night w/ roach bites. Obviously works in SHAC.
06/25/2013	IslamPractice, Example/Physician Sign Off Request	Sign off request
06/25/2013	AlianPractice, Example/Physician Sign Off Request	Sign off request
06/22/2013	AATestRLDAdultMale, CCCCC/Failed to Send Lab Order	Unable to find insurance info for order number: PRO45652! Insurance is required for third party ...
06/05/2013	AATestRLDChildFemale, AAAAA/Recall	Template variant test

This concludes the  
NextGen task demonstration.

He who laughs last, thinks slowest.