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.



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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.

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

Time

The first column indicates the task priority: low (\downarrow), 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 | |
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| 2 07/2 | 22/2013 | AATestRLDAdultFemale, AAAAA/Recall | M'gram |
| 10 07/0 | /02/2013 | DuffyPractice, Example/Failed to Send Lab Order | Unable to find insurance info for order number: PRO45671! Insurance is required for third |
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| ℃]□ 07/0 | /02/2013 | LamPractice, Example/need urine sample | random drug screen on all my employees |
| ℃,□ 07/0 | /02/2013 | WallacePractice, Example/Patient visit | stuff |
| 😨 🗌 07/0 | /02/2013 | IslamPractice, Example/Sample Subject | Saw your patient in ER last night w/ roach bites. Obviously works in SHAC. |
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| All Tasks Due Date - 10/11/2013 09/09/2013 08/30/2013 08/29/2013 08/29/2013 08/28/2013 08/28/2013 07/29/2013 07/29/2013 07/02/2013 07/02/2013 07/02/2013 07/02/2013 07/02/2013 07/02/2013 | Refills Test Results Questions Patient/Subject AATestRLD, QuinellaGT/Lab Results AaTest, Adam/Physician Sign Off Request AATestRLD, PaulineGT/Lab Results AATestRLD, PaulineGT/Lab Results AATestRLD, MaggieGT/Lab Results AATestRLD, OtisGT/Lab Results AATestRLD, OtisGT/Lab Results AATestRLD, NellGT/Lab Results AATestRLD, NellGT/Lab Results AATestRLD, GertrudeGT/Failed to Send Lab Order AATestRLD, GertrudeGT/Lab Order Error AATestRLDAdultFemale, AAAAA/Recall DuffyPractice, Example/Failed to Send Lab Order DuffyPractice, Example/Lab Order Error LamPractice, Example/Neternet visit IslamPractice, Example/Sample Subject | Description Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B Sign off request Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas. Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas. Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ SH \ Send to PS Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment Unable to find insurance info for order number: PR045682! Insurance is required for third Unable to find insurance info for order number: PR045682! Insurance is required for third M'gram Unable to find insurance info for order number: PR045671! Insurance is required for third Unable to find insurance info for order number: PR045671! Insurance is required for third Unable to find insurance info for order number: PR045671! Insurance is required for third Unable to find insurance info for order number: PR045671! Insurance is required for third Unable to find insurance info for order number: PR045671! Insurance is required for third Saw your patient in ER last night w/ roach bites. Obviously works in SHAC. |
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| 魯 Work Flow [Duffy, Robert L] | |
|--|---|
| Appointments 12/22014 Duffy | |
| Time A Room Patient/Subject | Reason Status |
| The middle column tells yo the task. | <mark>u several other things about</mark> |
| All Tasks Refills Test Results Questions | Description |
| 10/11/2013 AATestRLD. OuinellaGT/Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio. Randm Ur \ TSH \ Occult B |
| 12 09/09/2013 AaTest. Adam/Physician Sign Off Request | Sian off request |
| 1 08/30/2013 AATestRLD, PaulineGT/Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B |
| 1 08/29/2013 AATestRLD, MaggieGT/Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas |
| 1 08/29/2013 AATestRLD, OtisGT/Lab Results | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri |
| 1 08/28/2013 AATestRLD, LarryGT/Lab Results | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC |
| 1 08/27/2013 AATestRLD, NellGT/Lab Results | Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment |
| 1 07/29/2013 AATestRLD, GertrudeGT/Failed to Send Lab Order | Unable to find insurance info for order number: PRO45682! Insurance is required for third |
| 1 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 |
| I 07/02/2013 DuffyPractice, Example/Failed to Send Lab Order | Unable to find insurance info for order number: PRO45671! Insurance is required for third |
| Image: 107/02/2013 DuffyPractice, Example/Lab Order Error | Unable to find insurance info for order number: PRO45671! Insurance is required for third |
| C. 07/02/2013 LamPractice, Example/need urine sample | random drug screen on all my employees |
| CI 07/02/2013 WallacePractice, Example/Patient visit | stuff |
| SAL 0//02/2013 IslamPractice, Example/Sample Subject | Saw your patient in ER last night w/ roach bites. Obviously works in SHAC. |
| CJU 06/25/2013 IslamPractice, Example/Physician Sign Off Request | Sign off request |
| CAL 00/25/2013 AlianPractice, Example/Physician Sign Off Request | Sign off request |
| IN U0/22/2013 AATestRLDAdultMale, CCCCC/Failed to Send Lab Order | Unable to find insurance into for order number: PRO45652: Insurance is required for third party |
| | |



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.



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.

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

| File | dit Default View Tools Admin Utilities Window Help | | | |
|---------|---|--|---|-------|
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| Ashl | igh Quagmire (F) DOB: 01/02/1957 (57 years) | Weight: 150.20 lb (68.13 Kg) Allergies: | (3) Problems: (3) Diagnoses: (18) Medications: (4) 💿 | |
| 50r | Address: 123 Toejam Trace MRN: Mobile, AL 36604 Insurance Contact: (251) 555-1234 (Home) NextMD | : 000000007762 Emergency Relation : MEDICAID OF ALABAMA Emergency Phores : No Pharmacy | PCP: ATKINSON, TANGELA C ne: Referring: 1: CAFFEYS PHARM Rendering: DUFFY, ROBERT LAMAR | |
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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.

| Message Date Due: 04/06/20 Subject: Message: | 13 Priority: Normat | Bookmark EKG Emergency Lab test Needs signature Patient visit Phone Call Template Unfinished chart X-ray Close |
|---|---------------------|--|
| | Cancel | |

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.)

| Message | |
|---|-----------|
| Date Due: 04/06/2013 Priority: Normal | |
| Subject: Lab test | Category: |
| Message: See lipid panel results; please call & infor | rm her. |
| | |
| | |
| | |

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.





New Group

Modify

Delete

Cancel

OK.





You can adjust Priority if desired.

| 🗄 🥨 FMC Attending Team (Attending Te 🔺 | Normal 🔻 | Name | Туре |
|--|--------------------|----------------------|-------|
| 🗄 FMC Attendings (Physicians) 🛛 🗕 | 3 / | EMC Nursing (Nurses) | Group |
| 🗄 🌃 FMC Blue Team (Blue Team e-Rx R | | | unoup |
| E G FMC Front Office (Front Office) | 👩 Add 🔿 | | |
| 🗄 🥰 FMC Green Team (Green Team e-R | Ser(s) | | |
| 🗄 🥰 FMC Medical Records (Medical Rec | | | |
| E I FMC Mid-Level (Mid-Level Provider | 📷 Add 🔿 | | |
| 🗄 🥰 FMC Momcare Case Worker (Social | 🚟 <u>G</u> roup(s) | | |
| E I FMC Nursing (Nurses) | | | D |
| Bell, Froncean H | A Persous | | |
| - 🛱 Blakely, Djakarta | 📥 Шенилле | | |
| G Clary, Frances | | | |
| G Edwards, Elizabeth E | O Chart | | |
| Kelley-McLaren, Julie | | | |
| 🕂 🦉 McMillan, Renetta | | 975 - | |
| Means, Camela | & your + | add in agent | |
| Rankin, Jonnita | κα your i | usk is sent. | |
| 🕂 🧖 Spears, Keona | 1 | | |
| | 1 | | |
| / | | 1 | |

| 🐚 NextGen EHR: Felicia Quagmire MRN: 00000002581 DOB: 11/01/1969 (Female) AGE: 40 years 11 months - 10/08/2010 11:54 AM : Doc 💻 🗗 💈 |
|--|
| File Edit View Tools Admin Utilities Insert Window Help |
| 👖 🖳 🥜 💥 USA FAMILY MEDICINE 🔹 DUFFY, ROBERT LAMAR MD 💌 🖧 🐎 😥 🖉 🐇 🧏 Theorem 1 and the state of the |
| I 10/08/2010 11:54 AM : "Intake - OV" = 10/08/2010 11:54 AM : Document "Provider_Test_Action" × |
| 🗄 HighEdit |
| Tr Times New Roman ▼ 10 ▼ ≣ Ξ Ξ ■ B I U ABC × ² × ₂ = = = To |
| |
| |
| |
| 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: |
| \mathbf{A} |
| 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¤ |
| |
| |
| |
| Page 1/1 Line 1 Col 1 |
| |

| edical Question - Telephone Call Information: Contact type: Incoming call Name: Name: Relationship: Spoke with: Patient Vrgency: Communication: Concern: Duration of symptoms: Comment: | | | Date of call: 06/02/2013 hip: A HI A HI | 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 | | | | |
|---|-------------|------------------------|---|---|--|------------------|-------------------------|-----------|
| Meds/Alle | ergies/Chro | next appt should be. F | Manage My Phrases | My Philases | Adjust medication: Adjust medication: Send test result(s): Counsel patient: | Admin A | action (Release of Info | Log (PHI) |
| Date | Time | Employee | Comments | | Tasked To | Priority: | | |
| 06/02/2013 | 4:23 PM | Robert L. Duffy | Pt wants to know if s before going to den | he should stop he tist Friday. | r aspirin | Send & C | llose | |
| , | | | | | (Telephone Call Summ | ary) Status: • 0 | open C Complete | Cancel |

Select Task Recipients



| Available Users / Workgroups: | | <u>I</u> ask Recipients: | |
|--|--|---------------------------------|-----------|
| Favorites Workgroups SHAC (radiology) Boys Group (BG) EHR fav (test group) Family Practice Phone Room (Phone FM Attendings (Family Medicine Attendings (Family Medicine Attending) | Add Add Add Add Add Add Add Add | Name | Type |
| FM Peterel Office (Femily Medicine FM The task recipien FM FM Would select a rec FMC FMC The task recipien FMC FMC The task recipien FMC The task recipien | t popup ap cipient as | pears, & you illustrated abo | ove. |
| All Osers USA Health Services Foundation Abernathy, Durant Abston, Chandra M Admin, NEXTGEN Accetinelli Alies 1 | | | |
| New Group Delete Modify | | | OK Cancel |

| 06/11/2014 | 4 11:51 AM : "US | A Phone & Clinic Memos 8 | 36" × | | | | | |
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| Specia | ilty 🔻 F amily Pr | actice Visit Type | Office Visit | | | 😲 ТОВ 🛛 😲 НТМ | ⊘DM ⊘CAD | \$ |
| fi 📃 | Intake | Histories | SOAP | Finalize | Checkout | | | |
| Care Gu | idelines | Global Days ∻ Comments Important: Ge | (Patient Contact Info |) (View Scheduled Appointme | nts) (Telephone Cal | II Summary) PCP: [Panel Control: 🕤 To | ROBERT DUFFY ggle 🕣 🔹 Cycle J | |
| Commun | ication: | | | | | | e |) |
| Clinic Mem Medical Qu Communica | os / Other Notes lestion ations: D ispla | Medication Referral Re y: | n Management quest | Test Result Request Billing Question to patient due to inability to conta | Forms/Records Outgoing Call act | | | |
| Date | Contact Time | Comments | | | Note By | Tasked To | Reason | |
| 06/13/2014 | 9:02 AM | Comment:Pt doesn't know when you planned to see | v when next appt shoul her next. | d be. Please advise her about | Robert L. Duffy | Christopher Bowen | Medical Question | |
| 06/13/2014 | 8:59 AM | Comment:There was a fax prescription. Please ask the those "cold call" faxes dire | in my box from medical he patient if she really a ectly from the company. | supply company about a scooter isked for this, or if it was one of | Robert L. Duffy | Misti Smith | Other | - |
| | Note Since the re openie appar | that you the task ecipient w ng the tas ent. | didn't ho was orig vill be ta sk, wher | ave to selec ginated from ken to that e the quest | t an att n withir templa ion is in | tachmen n a temp te upon nmediate | t. late, ely | |

| Work Flow [Duffy, Rob | ert L] | | | | |
|---|--|--|---------------------------|-------------------------|-------|
| Appointments | 6/2013 💌 👤 DUFFY, ROBI | ERT LAMAR MD | | | |
| Time 🔺 Room | Patient/Subject | | Reason | Status | |
| Those create within | are probably tasks. But y the Workflow | the two mo ou can also w itself. | st common create a to | ways you'll ask from | |
| Click A Tasks All Tasks To Due Date ▲ F 3 12/23/2012 | est Results Questions Patient/Subject | Des ign Off Recuest Sign | cription n off request | | |
| Image: Contract of the second seco | | | | | |
| | | Ad | ld • Remove | Edit | Chart |



| 🌍 NextGen EHR: Quincy Q Quagmire MRN: 000000 | 0008 |
|---|------|
| File Edit Default View Tools Admin Utilities Windo | w H |
| 🟦 🔚 🧭 🐣 USA FAMILY MEDICINE 🖃 DUFF | ROL |
| 08/19/2010 09:57 PM : "USA Master Im2" 08/ | F |
| 🚰 Work Flow [Duffy, Robert L] | |
| New Task | a |
| Due Date: 8/28/2010 - | b |
| Priority: Normal Completed | |
| Subject: Lipid panel | |
| Description: Please make sure he's notified about the lipid panel. | |
| | a |
| | |
| Assigned Anderson, Brenda; Assign To | l u. |
| | m |
| Patient:Select | is |
| Attach: | |
| Task Categories Add Cancel | a. |
| 08/27/2010 Duffyrl, Example001k/Physician Sign | d |
| Description Description Test, Lisa/Lab Results Description Description Test, Maxwell ab Results | |
| I I 08/25/2010 Test, Matt/Lab Results | r |
| □ 08/24/2010 Test, Mom/Lab Results □ 08/24/2010 Test Lisa/Lab Results | |
| 08/24/2010 Test, Matt/Lab Results | 4 |
| 08/24/2010 Test, Dee dee/Lab Results | |
| | |
| Anticoagulation | В |
| | n |
| Ready | P |
| 🏄 Start 🜏 C:\MSOData 🛛 🕢 🕅 Microsoft Word | 🕃 Ne |

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

DOB: 07/25/1948 (Male) AGE: 62 years 1 month - 08/19/2010 09:57 PM

lote that a task could also be sent bout a general guestion, & not ssociated with a patient. But since lost tasks will reference a patient, it much easier on the recipient if you ttach a patient. And there is no irect way for the recipient to espond to you if you just send a uestion without a patient attached.

Bottom line: ALWAYS attach the patient in question.

NextGen

😚 NextGen EHR: ... 📝 NextGen EHR H...

n EHR H... 📔 🛃 🚳 🕓 🕕 🌠 😨 🧶 - 11:33 PM

| 隨 NextGen EHR: Quincy Q Quagmire MRN: 00000000089 DOB: 07/25/1948 (Male) AGE: 62 years 1 month - 08/19/2010 09:57 PM : "US 🛽 | - 8 × |
|---|---------|
| File Edit Default View Tools Admin Utilities Window Help | |
| 1 Logout Save Clear Delete USA FAMILY MEDICINE DUFFY, ROBERT LAMAR MD DUFFY, ROBERT LAMAR | |
| I | ąχ |
| A patient search popup appears. Type the patient's name, then click Find. | |
| Priority: Normal Completed | |
| Subject: Lipid panel | |
| Description: Please make sure he's notified about the lipid panel. | |
| A Patient Look p | |
| Search Criteria | |
| Assigned Last First / Nickname Middle Previous Last City Address Line 1 Zip | |
| Patient: Consid Course Disk Data Course Data Plana Course Data Alter Data Nite Data Nite Cons Nite | |
| Attack Social Security Birth Date Sex Frome Frome Search By Med Rec Nor Policy Nor Find Nor | |
| View By External System External ID | |
| Task Ca All Patients | ľ |
| Birth Date GL4DSSN | |
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| Clear Find New Close | |
| Ø 08/24/2010 Test, Lisa/Lab Results Glucose, Serum | |
| OB/24/2010 Test, Matt/Lab Results Lipase, Serum \ Amylase, Serum | |
| Outrest, Dec deer Lab Tresuits Outrest As (Non ICD) \ Magnosium Corum | |
| Mew Task - X Delete <table-cell> Modify 🖃 Send 🔎</table-cell> | lart. |
| Anticoagulation Flu Vax 08/19/2010 | 1 |
| Ready USA Health Services Foundation rlduffy CAP NUM SCRL 08/ | 28/2010 |

| 🌍 NextGen | EHR: Quincy Q Quagmire MRN: 00000000089 DOB: 07/25/1948 (Male) AGE: 62 years 1 month - 08/1 | 9/2010 09:57 PM : "US 💶 🗗 🗙 |
|--------------|---|-------------------------------|
| File Edit D | Default View Tools Admin Utilities Window Help | |
| Logout Save | Clear Delete USA FAMILY MEDICINE 💌 DUFFY, ROBERT LAMAR MD 💌 🖧 🎦 🖉 🖉 🖉 Templates Documents | Redications ICS Apps Close |
| 4 1 08, | /19/2010 09:57 PM : "USA Master Im2" 🔲 08/19/2010 09:57 PM : "USA Telephone Call" 🗙 | ▷ Patient History ♀ × |
| 🔁 Work Fl | ow [Duffy, Robert L] | |
| New Task | | |
| Due Date: | Double-click on the patient's name when it a | appears. 🗖 |
| Priority: | Normal Completed | |
| Subject: | 🚴 Patient Lookup | <u> </u> |
| Description: | Search Criteria | |
| | Quagmire Nigel Middle Previous Last City Address Line 1 Zp | |
| | Social Security Birth Date Sex Home Phone Search By Med Rec Nbr Policy Nbr Enc Nbr | |
| | | |
| Assigned | View By External System External ID | |
| | Birth Date 6 L4DSN | |
| Patient: | | |
| Attach: | Matching Records | orm him. |
| Task Cal | Name Nickname Address Sex Birth Dt SS Nbr H | |
| | Uuagmire, Nigel Skip I oMyLeo Mobile, A., Male U2/01/1351 | |
| | | |
| | | |
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| | | Routine |
| | | 3 Modify 📧 Send 🌒 Chart |
| Anticoagula | Becords Found 1 | |
| <u> </u> | | |
| Ready | Clear Find - New Open Close | duffy CAP NUM SCRL 08/28/2010 |

| 🔄 NextGen EHR: Quincy Q Quagmire MRN: 00000000089 DOB: 07/25/194 | 48 (Male) AGE: 62 years 1 month - 08/19/2010 09:57 PM : "US 💶 🗗 🗙 | | | | | | |
|--|---|--|--|--|--|--|--|
| File Edit Default View Tools Admin Utilities Window Help | | | | | | | |
| 📆 🚰 🎸 🔀 USA FAMILY MEDICINE 🔹 DUFFY, ROBERT LAMAR MD 🔹 🖧 🏠 🚺 🛃 🗮 🗐 🦉 🧏 🦕 🔀 🔤 🖉 Close 🕫 | | | | | | | |
| ▲ 08/19/2010 09:57 PM : "USA Master Im2" 📕 08/19/2010 09:57 PM : "USA T | elephone Call" × Patient History # × | | | | | | |
| 😤 Work Flow [Duffy, Robert L] | | | | | | | |
| New Task | | | | | | | |
| Due Date: Click the Attach dropdown | arrow to attach a chart 💻 | | | | | | |
| Subject Component. While not require | juired, this is very | | | | | | |
| Description: helpful to the recipient. (| The attachment | | | | | | |
| selection process is the sa | me as illustrated above.) | | | | | | |
| Assigned Anderson, Brenda; | | | | | | | |
| | | | | | | | |
| Patient: Quagmire, Nigel Select | | | | | | | |
| Attach: | Description | | | | | | |
| Template | Medical Question | | | | | | |
| Task Cate Document Add Cancel | Trying to create a simple task. | | | | | | |
| ICS Image Off Request | sign off request | | | | | | |
| M 08/25/2010 Test, Lisa/Lab Results | Yeast Only, Culture | | | | | | |
| 🛛 🖸 🔲 08/25/2010 Test, Mom/Lab Results | CBC With Differential/Platelet | | | | | | |
| 1 🖸 🗆 08/25/2010 Test, Matt/Lab Results | Stool Culture \ Stool Culture | | | | | | |
| Ø □ 08/24/2010 Test, Mom/Lab Results | CBC With Differential/Platelet | | | | | | |
| | Linase Serum \Amulase Serum | | | | | | |
| 🗹 🗆 08/24/2010 Test, Dee dee/Lab Results | CBC With Differential/Platelet \ Urine Culture, Routine | | | | | | |
| II C 00/22/2010 Test Mam/Lab Desulte | Direct As (Non ICD)). Magnosium: Corum | | | | | | |
| | New Task - X Delete Modify E Send | | | | | | |
| Anticoagulation | Flu Vax 08/19/2010 | | | | | | |
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| 💿 NextGen EHR: Quincy Q Quagmire MRN: 00000000089 DOB: 07/25/194 | 18 (Male) AGE: 62 years 1 month - 08/19/2010 09:57 PM : "US 💶 🗷 🗙 |
|---|---|
| File Edit Default View Tools Admin Utilities Window Help | |
| 1. Logovit Save Clear Delete USA FAMILY MEDICINE 💌 DUFFY, ROBERT LAMAR MD 💌 | Patient History |
| 4 / 🔲 08/19/2010 09:57 PM : "USA Master Im2"/ 🔲 08/19/2010 09:57 PM : "USA Te | elephone Call" × Patient History # × |
| 😤 Work Flow [Duffy, Robert L] | |
| New Task | |
| Due Date: 8/28/2010 | Reason Status |
| Priority: Normal Completed | |
| Subject: Lipid panel | |
| Description: Please make sure he's notified about the lipid panel. | |
| Clipte Add to finish | |
| Click Add to finish | senaing the task. |
| | |
| | |
| Assigned Anderson, Brenda; Assign 2 | |
| Patient: Quagmire, Nigel Select | |
| Attach: Touchter and Add Employ Du | Description |
| | See lipid panel results; please call patient & inform him. |
| Task Categories Add Cancel | Medical Question |
| Off Request | sign off request |
| 08/27/2010 Duffyrl, Example001k/Physician Sign Off Request | sign off request |
| 🖸 🗌 08/25/2010 Test, Lisa/Lab Results | Yeast Only, Culture |
| O8/25/2010 Test, Mom/Lab Results | CBC With Differential/Platelet |
| I I 08/25/2010 Test, Matt/Lab Results | Stool Culture \ Stool Culture |
| | CBC With Differential/Platelet |
| OP/24/2010 Test, Lisa/Lab Results | Linne Court Andrea Court |
| OS/24/2010 Test, Mat/Lab Results | CRC With Differential/Platelet \ Urine Culture, Routine |
| I C 00/22/2010 Test, Dee deer Lab Hesuits | Direct As (New ICD)). Magnesium, Serum |
| | New Task - X Delete Modify E Send - Chart |
| Anticoagulation | Flu Vax 08/19/2010 |
| | |
| Ready | USA Health Services Foundation rlduffy CAP NUM SCRL 08/28/2010 |

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.

| 20 (| 08/28/2010 | Quagmire, Quincy Q/Phone call | Medical Question | |
|--------|------------|--|------------------|---|
| ₽,□ (| 04/21/2010 | Smith, MgI005/Physician Sign Off Request | sign off request | |
| 12,□ (| 04/22/2010 | Cox, MgI001/Physician Sign Off Request | sign off request | |
| €,□ (| 04/21/2010 | Roose, MgI001/Physician Sign Off Request | sign off request | - |
| 12,□ (| 04/21/2010 | Roose, MgI002/Physician Sign Off Request | sign off request | |
| €,□ (| 04/21/2010 | Roose, MgI003/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.

| 🚰 Work Flow [Duffy, Robert L] | | | |
|----------------------------------|------------------------------|-------------------|------------------------------|
| Appointments 04/06/2013 | UUFFY, ROBERT LAMAR N | ID | |
| Time 🔺 Room | Patient/Subject | Reason | Status |
| | | | |
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| | | | |
| | | | |
| Tasks (All Tasks) Test Resu | Its Questions | | |
| ! D ✓ Due Date ⊽ Patient/Subject | 1.5 | Description | <u> </u> |
| Cox, MgI005/ | Physician Sign Off Request | sign off request | |
| 1 00/20/2010 Quaginite, Qu | 5/Physician Sign Off Request | sign off request | |
| | ysician Sign Off Request | sign off request | |
| C. 04/21/2010 Roose, Mgl00 | 1/Physician Sign Off Request | sign off request | |
| Tn this ever | nnle we'll accer | t the Phone call | task on Mr |
| I III IIIS EAU | npie, we in accep | n me i none cun | TUSK ON MI. |
| Quagmire. | There are 5 (ve | es 5) ways to bea | in. |
| Television Smith Malant | i/Physician Sign Off Request | sign all request | |
| 04/20/2010 Liu, Mgl001/F | Physician Sign Off Request | sign off request | |
| | | 💆 New Task 💌 🗡 | (Delete Modify) I⊟ Send Send |



Task Details

| Task Detai | ls | × |
|--------------|--------------------------------|----------------|
| Due Date: | 8/27/2010 | 7 |
| Priority: | Normal | Completed |
| Subject: | Phone call | |
| Description: | Medical Question Click ACCEPT. | <u>+</u> T |
| Assigned by: | Jane Smith | REASSIGN |
| Patient: | Quagmire, Quincy Q | <u>S</u> elect |
| Attach: | Template USA_ta | elephone_call |
| 🔲 Task Cate | egories ACCEPT | DECLINE |



| After hours After hours Communication: Conserve: Concern: Someone else. Comment: Sort By: South By: Summary Phote may Phote may Phote may Phrases Manage My Phrases Send referral: Place new medication order: Place new medication: Send test result(s): Counsel patient: Conserve: Counsel patient: Meds/Allergies/Chronic Probs Review of Test(s) Date Time Comment: Comments: Pate Time Comment: Comments: Pate Time Comment: Comment: Reply 202 AM Comment: Keriew of the mask Reply 202 AM Send & Close Thomas McFaden Status: Open Complete Thomas McFaden | edical Quest Call Informati Contact type: Task respon: Urgency: Date of call: 06/13/2014 | tion - Telep tion: se Time of (9:00 / | AM | re responding to to Task response tact type isn't abs Name: Type your response Close to reply to 1 | a task, so cl e (though sj solutely necc se. You cou che person v | hange Contact becifying a essary). Id click Reply & who sent you the |
|---|--|--|--|---|--|--|
| Date Time Concerns/Issues Comment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next. Employee Te Priority: Normal 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 Piority: Normal Reply & Close Transking: Od/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. Send & Close Reply to: Status: © Open © Complete Thomas McFaden | After hour | rs ion: Sa 3 months; p rgies/Chro | ort By: C Summary Ilease let pt know. | task, or click Sens someone else. Phrase My Phrases Manage My Phrases Review of Test(s) | Actions: Close TO Actions: Close TO Schedule appointment: Send referral: Place new medication order: Adjust medication: Send test result(s): Counsel patient: Other: | Send it to |
| 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 C Send & Close Reply to: Thomas McFaden Status: © Open © Complete | This Commun Date | nication Hist | tory: Concerns/Issues | Comments | Employee Ta | Admin Action Release of Info Log (PHI) Tasking: Priority: Nermal |
| | 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 CI | Send & Close Reply & Close Reply & Close Thomas McFaden Status: • Open |



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 : "US | A Phone & Clinic Memo | s 836" × | | | | | | |
|-------------|------------------------|--|---|--|---------------------|------------------|--------------|----------|---|
| Special | ty ▼ Family Pr | actice Visit Ty | pe 🔻 Office Visit | | | 😝 тов 🛛 😝 нті | N ⊘DM | ⊘ CAD | 0 |
| fi 🚽 | Intake | Histories | SOAP | Finalize | Checkout | | | _ | |
| Care Gui | delines (| Global Days ♦ Commen | ts (Patient Contact In | fo) (View Scheduled Appointme | nts) (Telephone Cal | II Summary) PC | P: ROBERT DU | FFY | |
| | | mportant: | Generate document | after every entry 😭 Gene | erate Document | Panel Control: 🕤 | Toggle 🕥 🦸 | Cycle | ÷ |
| Communi | cation: | | | | | | | (| • |
| Clinic Memo | s / Other Notes | Medicat | ion Management | Test Result Request | Fo ms/Records | | | | |
| Medical Que | stion ions: Display | Referral | Request | Billing Question er to patient due to inability to cont | Outgoing Call | | | | |
| Date | Contact Time | Comments | | | Note By | Tasked To | Reason | | - |
| 06/13/2014 | 9:14 AM | Comment:Next visit in 3 | 3 months; please let pt k | now. | Robert L. Du fy | Christopher Bowe | n Medical C | Question | |
| 06/13/2014 | 9:02 AM | Comment:Pt doesn't kr when you planned to s | omment:Pt doesn't know when next appt should be. Please advise her about when you planned to see her next. | | | Christopher Bowe | n Medical C | Question | |
| 06/13/2014 | 8:59 AM | Comment:There was a prescription. Please as those "cold call" faxes of | fax in my box from medio k the patient if she really directly from the compan | al supply company about a scooter y asked for this, or if it was one of 1y | 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.)

| File | Edit | View | Tools | Admin | Utilities | Insert | Format | Table | Window | Help |
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| ter | mplate | 2, yo | ı may ask? | 100% ▼ [L] * | II <u>A</u> ▼ 3≣ ▼ I | 5 ×2 X* | |
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| | | | Telephone Note and Clinic Memo Hist | I his ta | sk is c | omplete | |
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| | Date 06/04/2013 | Time 10:14:04 | Notes Next visit in 3 months; please let him know. | Click I | sk is c 1 <mark>box</mark> to | omplete o return | |
| | Date 06/04/2013 06/04/2013 | Time 10:14:04 09:17:11 | Notes Next visit in 3 months; please let him know. Pt doesn't know when next appt should be. Please advise. | Click In to your | sk is c n <mark>box</mark> to task l | omplete o return ist. | |
| | Date 06/04/2013 06/04/2013 06/02/2013 | Time 10:14:04 09:17:11 17:18:08 | Notes Next visit in 3 months; please let him know. Pt doesn't know when next appt should be. Please advise. 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." | I his ta Click I to your Robert L. Duffy | SK IS C box to task l Clinic Notes/Other | omplete o return ist. | |
| | Date 06/04/2013 06/04/2013 06/02/2013 06/02/2013 | Time 10:14:04 09:17:11 17:18:08 16:47:57 | Notes Next visit in 3 months; please let him know. Pt doesn't know when next appt should be. Please advise. 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." Pt wants to know if she should stop her aspirin before going to dentist Friday. | I his ta Click I to your Robert L. Duffy Robert L. Duffy | SK IS C box to task I Clinic Notes/Other Medical Question | omplete o return ist. | |

| 2 WORK Flow | v [Duffy, Robert L] | | | | | |
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| | ntments 13/12/2014 - | Duffy | | | | |
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| Time 🔺 | Room | Patient/Subject | | Reason | Status | |
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| 🚰 Work Flow [Duffy, F | Robert L] | |
|-----------------------------|--|---|
| Appointments | 05/12/2014 🖵 👤 Duffy | |
| Time A Room | Patient/Subject | Reason Status |
| inite Room | raterity subject | |
| A ch | eck mark appears in | the Completed box. |
| Unle | ss you've chosen to d | isplay your completed tasks, this |
| tack | will disappear from | your list the next time it is |
| Tush | win usupped 110m | our list the next time it is |
| lrefr | eshed usually within | a minute. |
| | | |
| | | |
| | | |
| Tasks All Tasks | Refills Test Results Questions | |
| 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 |
| 1 10 08/30/2013 | AATestRLD, PaulineGT/Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B |
| | AATestRLD, MaggieGT/Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas |
| | AATestRLD, OtisGT/Lab Results | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ki |
| | AATestKLD, LarryGT/Lab Kesults | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Kandm Ur \ ISH \ Send to PSC |
| | AATestRLD, Nelig I/Lab Results | Lipid ranel (Occurt Biood, recal, IA (Send to rSC) (Cardiovascular Kisk Assessment |
| | AATestRLD, GertrudeGT/Lah Order Error | Unable to find insurance into for order number: PRO45062: Insurance is required for third |
| | AATestRLD, GertrudeGT/Lab Order Error | Misram |
| 07/02/2013 | DuffuBractice Example/Eailed to Send Lab Order | Migram |
| | DuffyPractice, Example/Lab Order Error | Unable to find insurance info for order number: PRO456711 Insurance is required for third |
| x ² □ 07/02/2013 | LamPractice Example/need urine sample | random drug screen on all my employees |
| 07/02/2013 | WallacePractice Example/Patient visit | chiff |
| 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 | Sian off request |
| 06/25/2013 | AlianPractice, Example/Physician Sign Off Request | Sign off request |
| 1 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 |
| | | Add Domains Calls Cand Chart |

Appointments 12/12/2014 🔻 👤 Duffy

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."

| Tasks All Tasks | Refills Test Results Questions | | |
|-----------------|--|--|-----------|
| 🗋 🖌 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 | -14-10-bi |
| 09/09/2013 | AaTest, Adam/Physician Sign Off Request | Sign off request | |
| 1 08/30/2013 | AATestRLD, Pauline VLab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Occult B | |
| 1 08/29/2013 | AATestRLD, MaggieGT, Lab Results | Comp. Metabolic Panel (14) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Creatine Kinas | |
| 1 08/29/2013 | AATestRLD, OtisGT/Lab R sults | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ Cardiovascular Ri | |
| 1 08/28/2013 | AATestRLD, LarryGT/Lab Regults | Basic Metabolic Panel (8) \ Lipid Panel \ Microalb/Creat Ratio, Randm Ur \ TSH \ Send to PSC | |
| 1 08/27/2013 | AATestRLD, NellGT/Lab Result | Lipid Panel \ Occult Blood, Fecal, IA \ Send to PSC \ Cardiovascular Risk Assessment | |
| 1 07/29/2013 | AATestRLD, GertrudeGT/Failed to Send Lab Order | Unable to find insurance info for order number: PRO45682! Insurance is required for third | |
| 1 07/29/2013 | AATestRLD, GertrudeGT/Lab Orde, 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

| Task Detai | ls | × |
|--------------|--------------------|--------------------|
| Due Date: | 8/27/2010 | 7 |
| Priority: | Normal | Completed |
| Subject: | Phone call | |
| Description: | Medical Question | <u> </u> |
| | Click REASSIC | N. |
| Assigned by: | Jane Smith | REASSIGN |
| Patient: | Quagmire, Quincy Q | <u>S</u> elect |
| Attach: | Template 🔽 U | ISA_telephone_call |
| 📕 Task Cate | egories Upd | ate |

Select Task Recipients

| Available Users / Workgroups: 💦 💽 🛧 🔹 🎓 | | <u>T</u> ask Recipients: | | |
|---|--------------------------------------|---------------------------------------|-----------------------|--------|
| Favorites Workgroups SHAC (radiology) Boys Group (BG) BR fav (test group) Family Practice Phone Room (Phone FM Attendings (Family Medicine Attendings (Family Medicine FM Referral Office (Family Medicine | <pre></pre> | Name | | Туре |
| Select the correct recitask to him as previousl The task will immediate Abston, Chandra M | pient, Dr. y demons ly drop of | Johnson, & trated. f of your to | send the ask list. | 2 |
| Admin, NEXTGEN | | | | |
| New Group Delete Modify | | | OK | 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.





| | | Click in the Reminder |
|---|--|---|
| ٩ | 05/26/2013 11:18 AM : "*USA Finalize" USA Reminder Tasks × | Recipient box to select the |
| _ | Reminder Tasks | recipient of the reminder. |
| | Reminder Recipient (can be yourself): Months from Now Reminder Date: // 0 1 2 0 3 0 4 0 5 0 6 0 9 0 (Date you wish reminder // 0 1 2 0 3 0 4 0 5 0 6 0 9 0 (Date you wish reminder // 0 1 2 0 3 0 4 0 5 0 6 0 9 0 Topic/Description: Details/Comments: Bd Dbpl Tasking Ids Rev 2 X Name Atient's Dixon, Arlene Dixon, Shil | yourself, & you can type the first few letters of the last name to rapidly scroll down the list. |
| Ī | Dodd, Deonna Donald, Beverly Donson, Tranesha Dortch, Shandra Dortch, Shandra | ppy existing order |
| | Douglas, Edna Douglas, Regina | Reminder Recipient Completed By Ordered By Date Ordered |
| | Dragotta, Laura Drinkard, Cammie Driver, Tiffany Dudeck, Amanda Duffy, Kristina Duffy, Kristina Duggar, Angela Duggar, Angela Dupont, Brian Durick, Stephen Dvess. Diane Refresh OK | |



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





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 Task | Save & Close |
| Reminder Recipient (can be yourself): McFaden, Thomas Months from Now | |
| Reminder Date: (Date you wish reminder to be received) | 9 C 12 |
| Topic/Description: FYI-Lab results Details/Comments Click to send reminder task: Send Task | s: 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. |

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



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

| | Recall Orde | rs | | Save & Clos |
|---|---|--|---|------------------------------|
| dd a Recall Order | nths from Now | | | |
| Recall Date // | 102030405060 | 9 C 12 | | |
| Event Chest CT | Event Cor | mments If haven sure he | 't gotten chest CT report had it done, & look for re | by this date, make eport. |
| Responsible Party Duffy, Robert Add Order | | Pa | tient's Next Appointm | ent see all app |
| Responsible Party Duffy, Robert Add Order | Enable row select | Pa | tient's Next Appointm | ent see all ap |
| Responsible Party Duffy, Robert Add Order xisting Recall Orders isplay (• all C uncompleted C completed Due Date Event | Enable row select Responsible Party | Pa ion to copy existing Completed By | tient's Next Appointm | ent <u>see all ap</u> |
| Responsible Party Duffy, Robert Add Order xisting Recall Orders isplay (• all () uncompleted () completed Due Date Event D6/04/2013 Chest CT | Enable row select Responsible Party Duffy, Robert | Pa ion to copy existing Completed By | tient's Next Appointm | Date Ordered 06/04/2013 |



| | By | Date | Time | |
|------------------------|--|---|-----------|-----|
| ✓ Ordered | Robert L. Duffy | 06/04/2013 | 12:47 AM | |
| Completed | Robert L. Duffy | 06/04/2013 | 12:54 PM | |
| der Details | | | | |
| Topic/Description | Chest CT | - | | |
| Reminder Date | 06/04/2013 | | | |
| | favorites C all | | | |
| Reminder Recipient | Duffy, Robert | | | |
| Details/Comments | If haven't gotten ches sure he had it done, a | st CT report by this da & look for report. | ite, make | |
| ompletion Details | | | | |
| Completion Comments | Got it. | | | |
| Reminder Task Sent | Jun 4 2013 4:00 |)AM | | |
| When done cli | ck Save th | nen Close | You can | the |

| 💁 Work Flo | w [Duffy, Robert L] | | | > |
|------------|------------------------|-----------------|--------|--------|
| Appoi | intments 📴/12/2014 💌 👤 | Duffy | | |
| 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 |
| Ø □ ≤ 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 Ord | er 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 AATestRLDAduitFemale, AAAAA/Recall | M'gram |
| O7/02/2013 DuffyPractice, Example/Failed to Send Lab Order | Unable to find insurance info for order number: PRO45671! Insurance is required for third |
| O7/02/2013 DuffyPractice, Example/Lab Order Error | Unable to find insurance info for order number: PRO45671! Insurance is required for third |
| C 07/02/2013 LamPractice, Example/need urine sample | random drug screen on all my employees |
| C 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. |
| C. 06/25/2013 IslamPractice, Example/Physician Sign Off Reque | st Sign off request |
| C. 06/25/2013 AlianPractice, Example/Physician Sign Off Reque | st 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 |

Add

▼)(Remove)

Edit

Send

This concludes the NextGen task demonstration.

He who laughs last, thinks slowest.

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