NEXTGEN
TASK DEMONSTRATION

This demonstration reviews how to send and respond to tasks, and 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 with EHR 5.6.4.15 and KBM 7.9. Subsequent updates may display cosmetic and functional changes.

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

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, and how to respond to them.

The "Workflow" view, consisting of the <u>appointment list</u> and <u>task list</u>, 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 <u>Inbox</u>.)

Appointments 8/28/2010 ▼   DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

Time ▽	Room	Patient/Subject	Reason	Status	Provider

All Tasks | To Do | Bookmarks | Lab Results | Calls

!	☐	✓	Due Date ▽	Patient/Subject	Description
🔄	☐		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/Physician Sign Off Request	sign off request
			04/21/2010	Roose, Mgl002/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	Smith, Mgl005/Physician Sign Off Request	sign off request

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. (When the Patient Portal has been activated, we'll need to go to one of the 3-pane views.)

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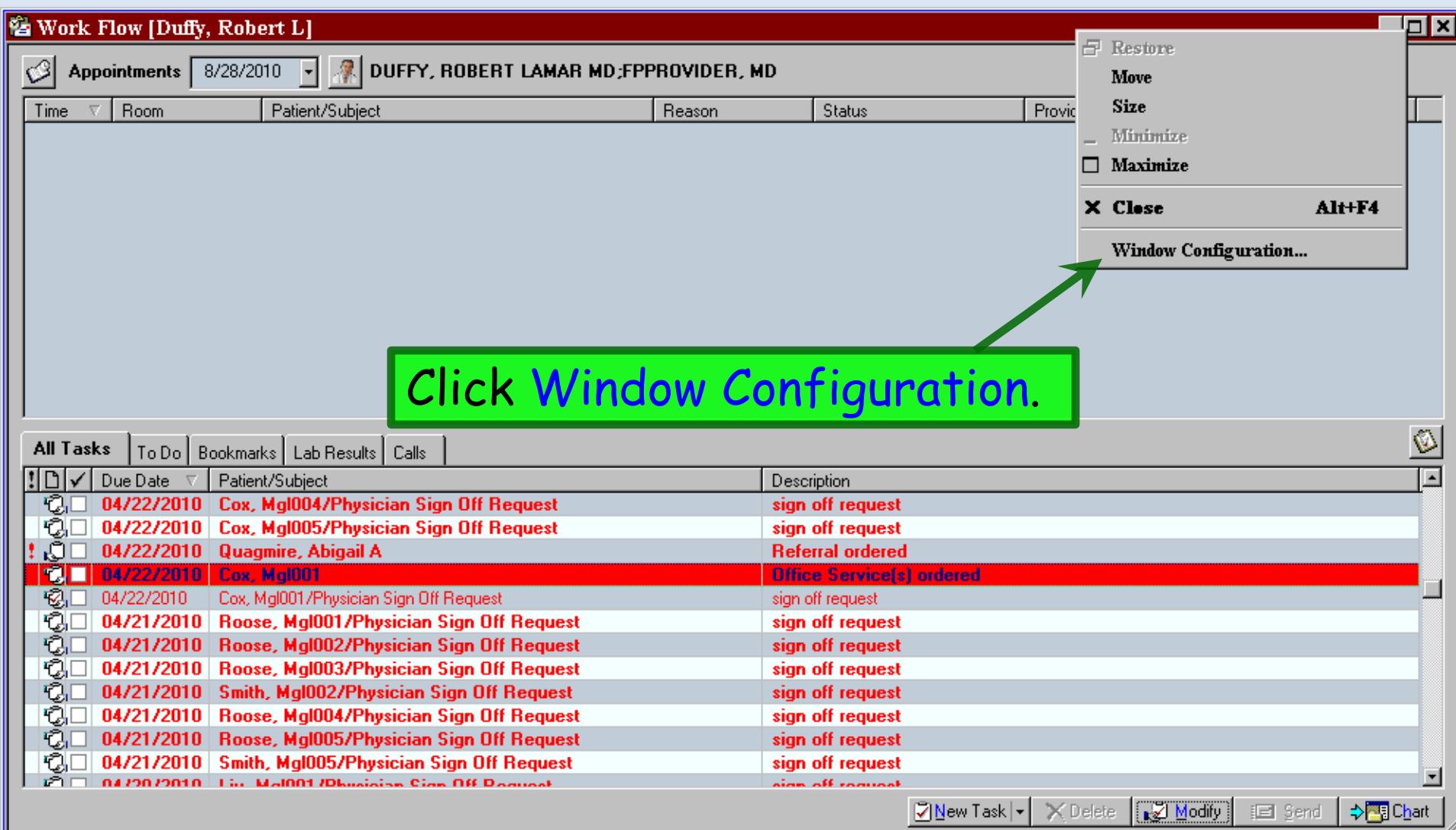
Select this configuration.

You can choose to view tasks that you've Completed, Deleted, or Assigned to Someone Else by clicking on these items.
(Often you'll want these unchecked, so that you'll only see tasks that have been assigned to you.)

Work Flow [Duffy, Robert L]

Appointments 8/28/2010 DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

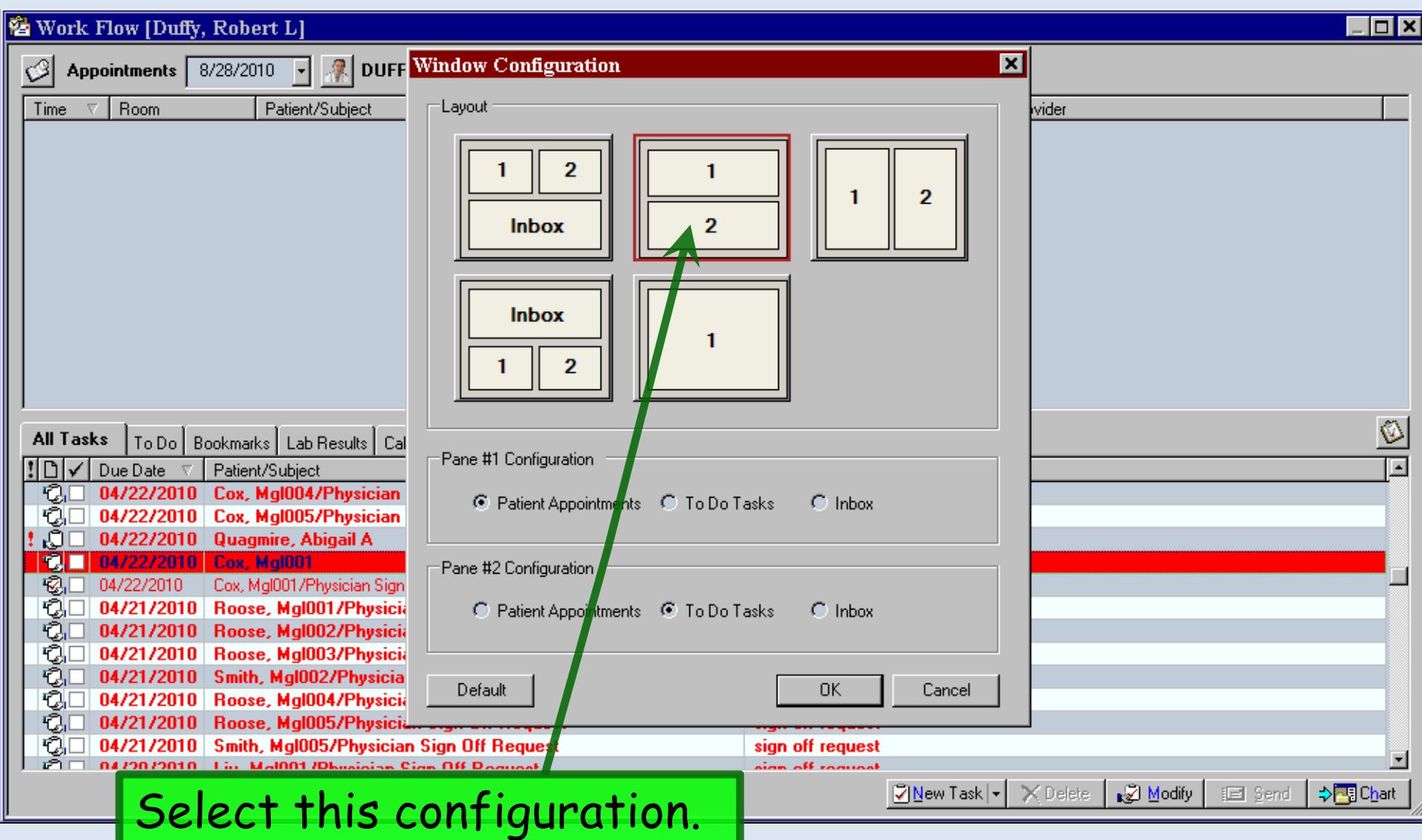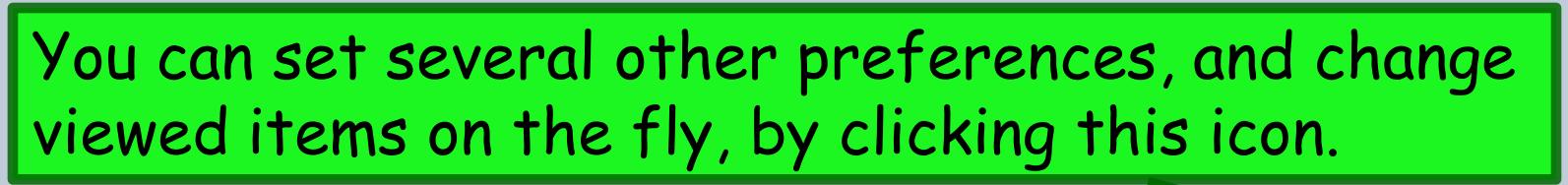| Time	Room	Patient/Subject	Reason	Status	Provider

You can manually Refresh your task list by clicking here.

All Tasks To Do Bookmarks Lab Results Calls

!	☐	✓	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

<Refresh>

✔ Show Completed Tasks
✔ Show Deleted Tasks
✔ Show Tasks Assigned To Someone Else

Setup Tabs...
Preferences...

View Tasks For ▶

Chart

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

Work Flow [Duffy, Robert L]

By default, you are viewing your own tasks.

You can View Tasks For other providers by clicking here.

This functionality may vary by department, and will not be further reviewed here.

| All Tasks | To Do | Bookmarks | Lab Results | Calls |

!	🗋	✔	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

<Refresh>

✔ Show Completed Tasks
✔ Show Deleted Tasks
✔ Show Tasks Assigned To Someone Else

Setup Tabs...
Preferences...

View Tasks For ▶

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

✗ Delete   🖉 Modify   📧 Send   ➡📊 Chart

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.

Work Flow [Duffy, Robert L]

Time	Room	Patient	Subject	Reason	Status	Provider

| All Tasks | To Do | Bookmarks | Lab Results | Calls |

!	🗋	✓	Due Date ▽	Patient/Subject	Description
	🗐	☐	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	Liu, Mgl001/Physician Sign Off Request	sign off request
	🗐	☐	04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

| ☑ New Task ▼ | ✗ Delete | 🗐 Modify | 🗐 Send | ➔🗐 Chart |

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.

All Tasks	To Do	Bc

!	☐	✓	Due Date ▽
↓		☐	08/28/2010
		☐	08/27/2010
		☐	08/27/2010
		☐	04/22/2010
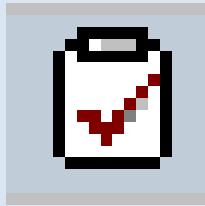
The final icon you'll see has a check mark, but no hands. This is a system-generated task. Examples of this type of task are tasks that come across an interface (e.g., from a lab or pharmacy), or tasks you send to yourself. They are by default automatically accepted, and thus have the check mark.

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   Templates   Documents   Images   Procedures   Apps

10/08/2010 11:54 AM : "Intake - OV"   ✕

Navigation

Tracking   Tasking

Intake
History
Summary
SOAP
Finalize OV
Checkout
Protocols

Record Vital Signs
Order Management
Allergies
Immunizations
Past Medical Hx
Family History
Social History
Tobacco Cessation
Problem List
Disease Mgmt
Procedures
Tuberculin Skin Test
Document Library

Nutrition
Anticoagulation

| Intake | Histories | Summary | SOAP | Finalize OV | Checkout | Protocols |

New patient   ⦿ Established patient
Template set: Visit type: Historian:
Family Practice   Chart Update

◆ Sticky Note   ◆ Screening Summary
◆ Referring Provider   ◆ Advance Directives

There are several ways to create tasks. One of the most versatile is to use the Tasking button at the top of the Navigation Bar.

Add Problem

	Code	Problem	Comments
	477.9	Allergic rhinitis, cause unspecified	
	V15.82	Personal history of tobacco use	

◆ Comment

Reconcile

Sig Description
take 1 tablet (100MG)
ORAL route every day
take 1 tablet (180MG)

Allergies ☐ No known allergies
⦿ Reviewed, no change
⦿ Allergies added today   ◆ Comment

Allergen	Reaction
CODEINE	Nausea

Reason for Visit   HPI Detail   Today's HPIs   HPIs

Review of Systems   Update

System	Neg/Pos	Findings

Appt Timeframe

ocardiogram (routine ECG), complete

Preview   Offline

/Radiology Order Processing   Order Management   Office Procedures   ◆ Intake Comments   Intake Note   Next

Ready

NGProd   USA Health Services Foundation   rlduffy   CAP   NUM   SCRL   10/22/2010

To Do

Date Due: Priority:
10/22/2010   High

Subject: Category:

Message:

Save and Close   Cancel

TodoPriority

High
Low
Normal

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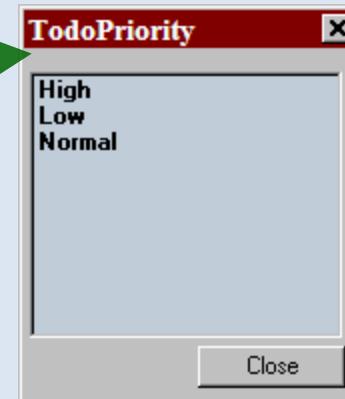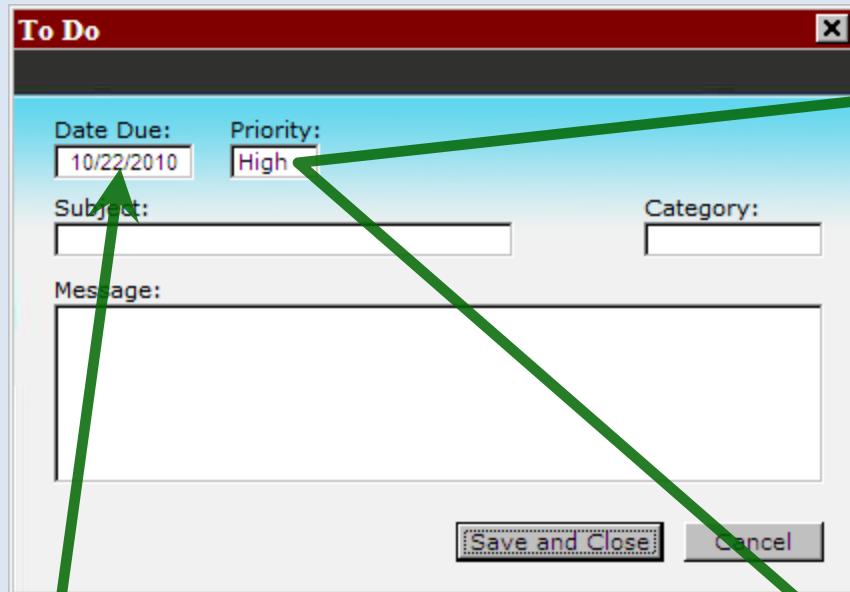
When you click this button, a popup appears that begins the task process.
By default, the Date Due will be today.

In this instance, the default priority came up as High; you can click in that box to change it to Normal if desired.

To Do

Date Due: 10/22/2010   Priority: Norma

Subject:

Category:

Message:

Save and Close   Cancel

Select Subject

Bookmark
EKG
Emergency
Lab test
Needs signature
Patient visit
Phone Call
Template
Unfinished chart
X-ray

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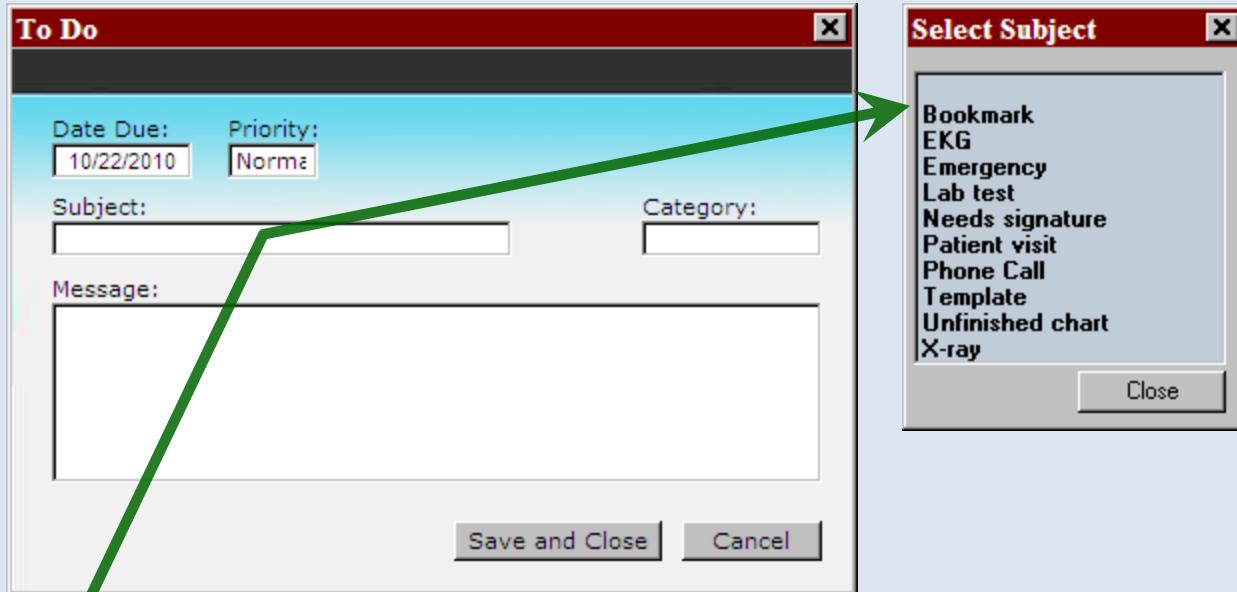
Click in the Subject box. You can select one of the popup subjects, or click the blank at the top of the list, and type a subject of your own.

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

To Do

Date Due: | Priority:
10/22/2010 | Norma

Subject:
Lab test

Category:

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

Save and Close | Cancel
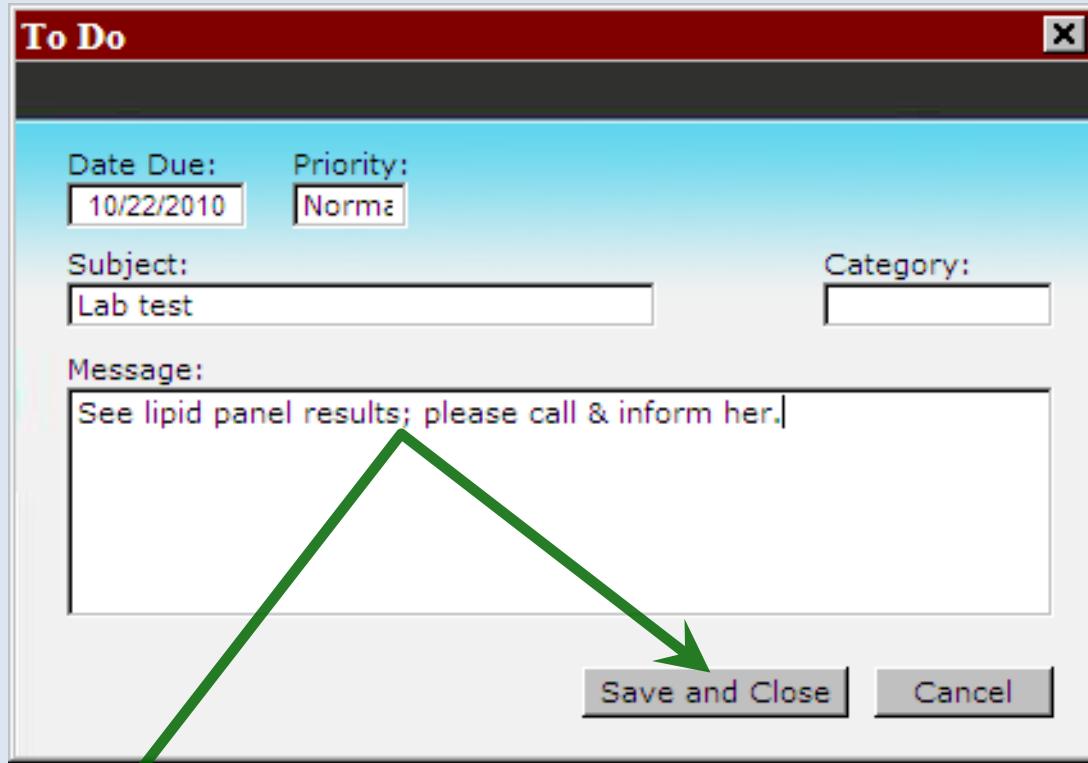
Click in the Message box, and type a message to your recipient. Click Save and Close when you're done.

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

Attach

Attach Patient's Document

[ ]

- (•) No Attachment
- ( ) This Template
- ( ) Template
- ( ) Document
- ( ) Image
- ( ) ICS Image

[OK]

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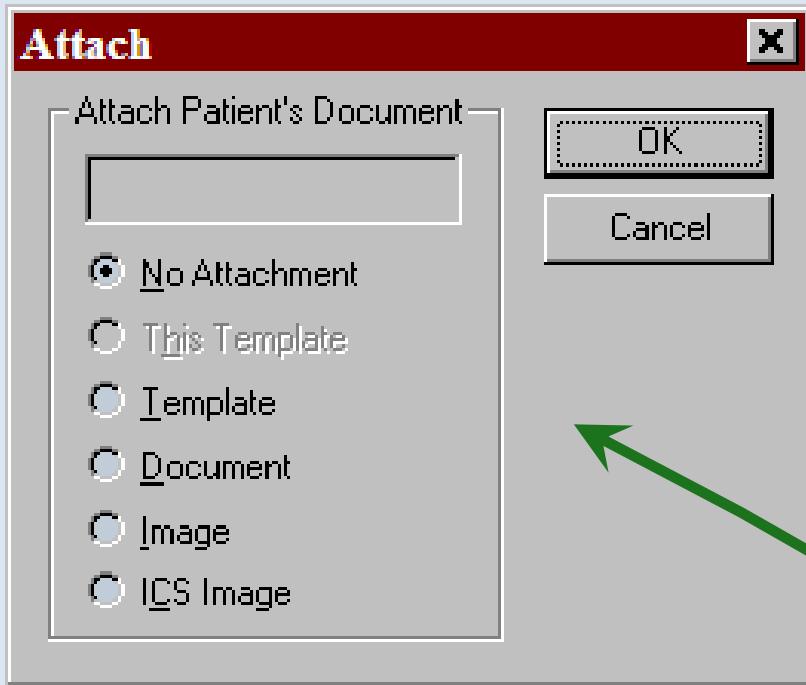
You have the opportunity to attach a component of the patient's chart (often a template or document) to the task. If you do this, when the recipient opens the task, the chart will open to that spot, making it easy to see what needs to be done.

You're not required to pick an attachment, but it is very helpful to do so.
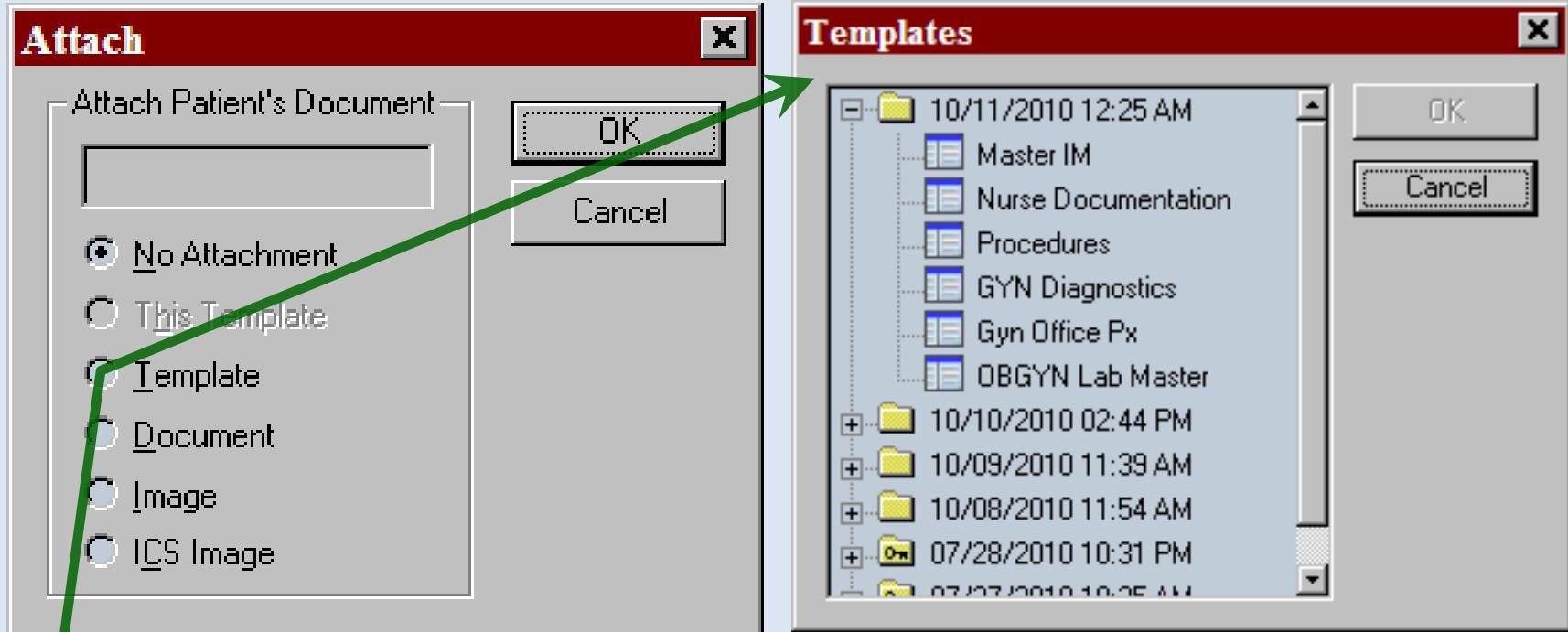
If you select Template, a popup will show available templates on the most recent encounter. You can also select templates from previous encounters.

Attach

Attach Patient's Document

[text field]

- ● No Attachment
- ○ This Template
- ○ Template
- ○ Document
- ○ Image
- ○ ICS Image

OK

Cancel

Documents

- □ 10/08/2010 11:54 AM
  - Provider Test Action
  - Master Im
- ⊞ 07/28/2010 10:31 PM
- ⊞ 07/27/2010 10:25 AM

OK

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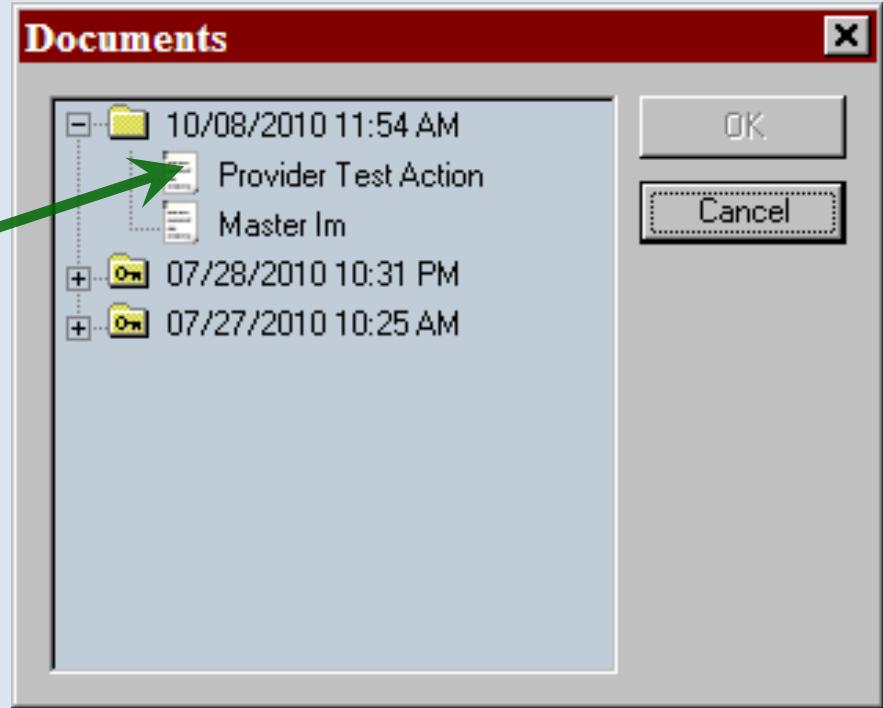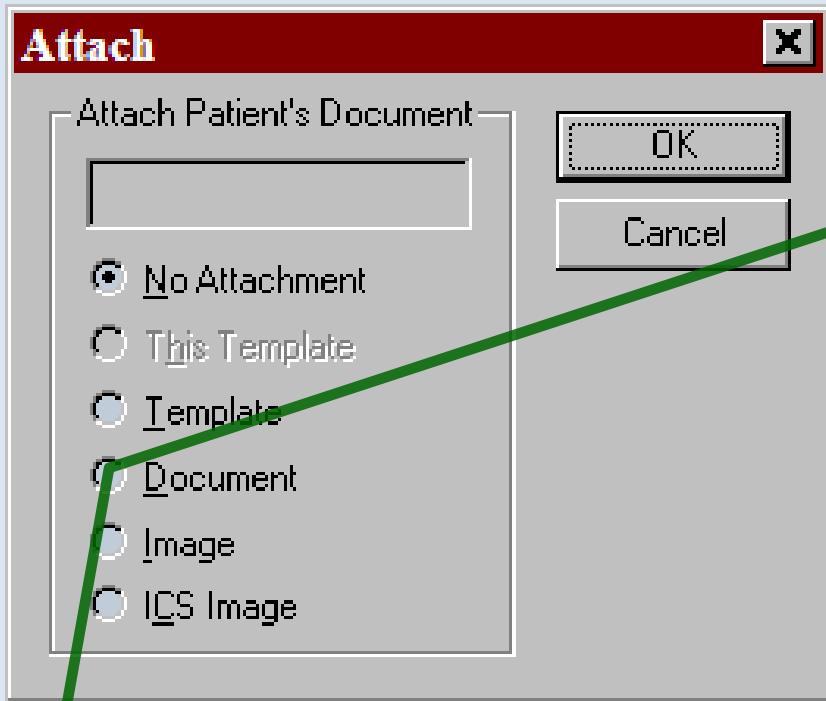
If you select Document, a popup will show available documents on the most recent encounter. You can also select documents from previous encounters.

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

Attach

Attach Patient's Document

Provider Test Action

- ○ No Attachment
- ○ This Template
- ○ Template
- ● Document
- ○ Image
- ○ ICS Image

OK

Cancel
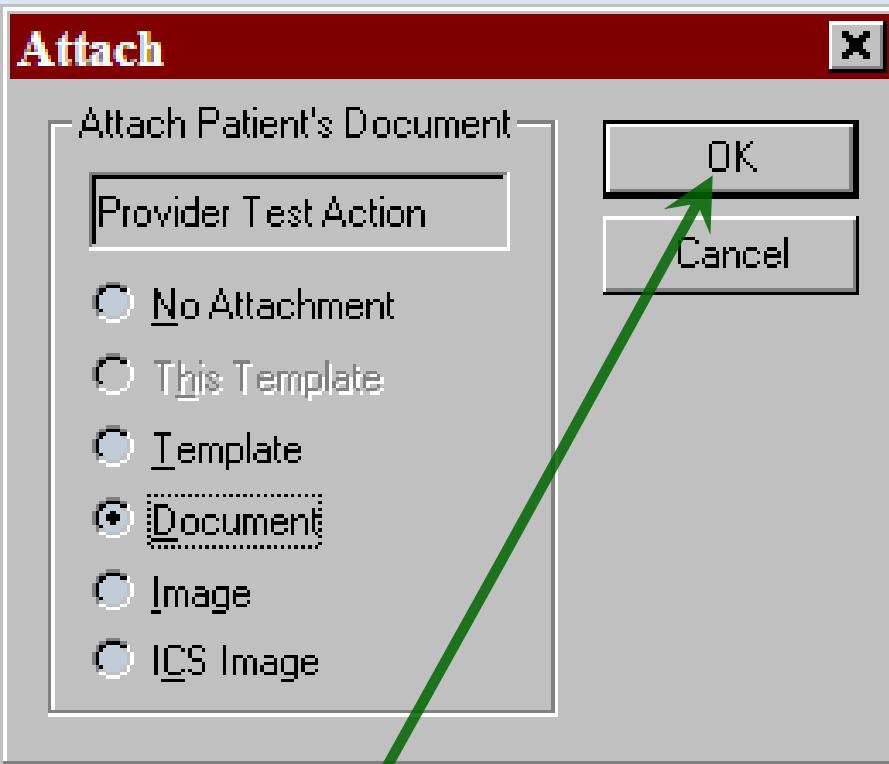
You're returned here; click OK again.

Select Task Recipients

Available Users / Workgroups:

- 📁 **Favorites**
- 📁 **Workgroups**
  - 🖧 SHAC (radiology)
  - ⊞ 🖧 Boys Group (BG)
  - ⊞ 🖧 EHR fav (test group)
  - ⊞ 🖧 Family Practice Phone
  - ⊞ 🖧 FM Attendings (Family
  - ⊞ 🖧 FM Referral Office (F
  - ⊞ 🖧 FM Residents (Family
  - ⊞ 🖧 FMC Clinical Students
  - ⊞ 🖧 FMC Nursing (Nurses
  - ⊞ 🖧 FMC Triage (test)
  - ⊞ 🖧 Test Group (Test)
- ⊟ 📁 **All Users**
  - ⊟ 📁 USA Health Services
    - 👤 Abernathy, Durant
    - 👤 Abston, Chandra M
    - 👤 Admin, NEXTGEN
    - 👤 Agostinelli, Alisa J

Task Recipients:

Name	Type

[New Group] [Delete] [Modify]   [OK] [Cancel]

In the ensuing popup, you choose your recipient(s).

Note the Workgroups that are listed. Several will appear for each department. While you can scroll down through all users to task anyone, using the workgroups will usually make it quicker to find your recipient.

In this example, click the + sign to expand the FMC Nursing workgroup.

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)
      👤 Anderson, Brenda
      👤 Bell, Froncean
   ⊞ 🖥  FMC Triage (test)
   ⊞ 🖥  Test Group (Test)
⊟ 📁 All Users
```

Task Recipients:

Name	Type

👤 Add ➡ User(s)

👥 Add ➡ Group(s)

⬅ Remove

🧽 Clear

New   OK   Cancel

Select your recipient by double-clicking the name, or by highlighting the name and clicking Add User(s).

You can add other recipients as well.

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 Atte**
  - ➕ 🖳 **FM Referral Office (Family Medicine**
  - ➕ 🖳 **FM Residents (Family Medicine Res**
  - ➕ 🖳 **FMC Clinical Students (PA/NP)**
  - ➖ 🖳 **FMC Nursing (Nurses)**
    - 👤 Anderson, Brenda
    - 👤 Bell, Froncean
  - ➕ 🖳 **FMC Triage (test)**
  - ➕ Test Group (Test)
  - ➖ **All Users**
    - 👤 Abernathy, Durant
    - 👤 Abston, Chandra M

Task Recipients:

Name	Type

Buttons: Add User(s), Add Group(s), Remove, Clear

New ... | ... | Cancel

Alternatively, you can add the entire workgroup by highlighting it and 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.

Select Task Recipients

Available Users / Workgroups:

- 📁 **Favorites**
- 📁 **Workgroups**
  - 👥 SHAC (radiology)
  - 👥 Boys Group (BG)
  - 👥 EHR fav (test group)
  - 👥 Family Practice Phone Room (Phon(
  - 👥 FM Attendings (Family Medicine Att(
  - 👥 FM Referral Office (Family Medicine
  - 👥 FM Residents (Family Medicine Res
  - 👥 FMC Clinical Students (PA/NP)
  - 👥 **FMC Nursing (Nurses)**
    - 👤 Anderson, Brenda
    - 👤 Bell, Froncean
  - 👥 FMC Triage (test)
  - 👥 Test Group (Test)
- 📁 All Users
  - 📁 USA Health Ser~~vices Foundation~~
    - 👤 Abernathy, Durant
    - 👤 Abston, Chandra M

Add ➡ User(s)

Add ➡ Group(s)

⬅ Remove

✎ Clear

Task Recipients:

Name	Type
👥 FMC Nursing (Nurses)	Group

Click OK, and your task is sent.

New Group | Delete | Modify | OK | Cancel

File   Edit   View   Tools   Admin   Utilities   Insert   Window   Help

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

10/08/2010 11:54 AM : "Intake - OV"   10/08/2010 11:54 AM : Document "Provider_Test_Action"   X

HighEdit

Times New Roman   10   B I U ABC   x² x₂
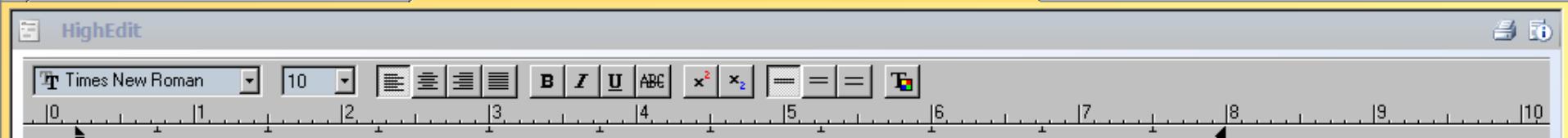
Document Name: **Provider Test Action**
Patient Name: Felicia Quagmire
Practice: USA FAMILY MEDICINE
Current Provider: ROBERT LAMAR DUFFY MD
Encounter Date: 10/08/2010 11:54 AM
Primary Care Physician:

When the recipient opens the task, the Provider Test Action document displays.

Lab:

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

Ready   NGProd USA Health Services Foundation rlduffy   CAP NUM SCRL 10/22/2010

Medical Question - Telephone

Call information

Contact type:
Incoming call

Time of call:
10:44 AM

Date of call:
10/22/2010

Spoke with: Name:
☑ Patient   [   ]

Relationship:
self

Urgency:
within 24 hours

❖ HIPAA

Communication

Concern:
[   ]

Duration of symptoms:
[   ]

Comment: Manage My Phrases   My Phrase
Pt doesn't know when next appt should be. Please advise.

▶ Meds/Allergies/Chronic Problems   ❖ Review of Test(s)

☐ Adjust medication: [   ] ☐
☐ Send test result(s):   [   ] ☐
☐ Counsel patient: [   ] ☐
☐ Other: [   ] ☐

▶ Admin Action   ▶ Release of Info Log (PHI)

This communication history

▶ Telephone Call Summary

Date	Time	Employee	Comments	Tasked To

Tasking

Priority:
Normal

▶ Send and Close

Status: ⦿ Open   ◯ Complete

Save and 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, and needs to task it to a nurse or provider.

After documenting the question, click Send and Close.

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 Atte
  - ⊞ 📇 FM Referral Office (Family Medicine
  - ⊞ 📇 FMC Clinical Students (PAANP)
  - ⊞ 📇 FMC Triage (test)
  - ⊞ 📇 Test Group (Test)
- 📂 **All Users**
  - 📂 **USA Health Services Foundation**
    - 👤 Abernathy, Durant
    - 👤 Abston, Chandra M
    - 👤 Admin, NEXTGEN
    - 👤 Agostinelli, Alisa L

Add ➡ User(s)

Add ➡ Group(s)

Remove

Clear

Task Recipients:

Name	Type

New Group   Delete   Modify   OK   Cancel

The task recipient popup appears, and you would select a recipient as illustrated above.

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   Templates   Documents   Images   Procedures   Apps

10/08/2010 11:54 AM : "Intake - OV"   10/08/2010 11:54 AM : "Telephone Call"   ✕

Navigation

▶ Alert   ▶ Patient Contact Info   ▶ View Scheduled Appointments   ▶ Telephone Call Summary   PCP:

❖ Sticky Note
❖ HIPAA

Communication

❖ Medication Management   ❖ Test Result Request   ❖ Forms/Records   ❖ Other   ❖ Charges

◆ Medical Question   ❖ Referral Request   ❖ Billing Question   ❖ Outgoing Call

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

Date	Time	Employee	Reason	Type	Contact By	Comments
10/22/2010	10:44 AM	Robert L. Duffy	Medical Question	Incoming call	self	Pt doesn't know when next appt should be. Please advise.

Medication

Medication	Form	Last Refill
Diflucan 100 mg Tab	TABLET	/ /
Fexofenadine 180 mg Tab	TABLET	/ /

Protocols   ☐ Show due within: 36 Months

Due	Test/Exam	Last Completed	Next Due
due	H&P		10/08/2010
	exam		10/08/2010
due	Breast exam		
	Sigmoidoscopy		/ /
	PAP		07/08/201
	Mammogram		
	Lip		

Allergies

Allergy	
CODEINE	nausea

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.

Work Flow [Duffy, Robert L]

Appointments 8/28/2010 ▼   DUFFY, ROBERT LAMAR MD

Time ▽	Room	Patient/Subject	Reason	Status

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 New Task.

| All Tasks | To Do | Bookmarks | Lab Results | Calls |

!	🗋	✓	Due Date ▽	Patient/Subject	Description
	📞	☐	08/28/2010	Quagmire, Quincy Q/Lipid panel	See lipid panel results; please call patient & inform him.
	📞	☐	08/28/2010	Quagmire, Quincy Q/Phone call	Medical Question
!	📞	☐	08/28/2010	Simple task	Trying to create a simple task.
	📞	☐	08/27/2010	Bellonej, Example001/Physician Sign 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
	☑	☐	08/25/2010	Test, Mom/Lab Results	CBC With Differential/Platelet
!	☑	☐	08/25/2010	Test, Matt/Lab Results	Stool Culture \ Stool Culture
	☑	☐	08/24/2010	Test, Mom/Lab Results	CBC With Differential/Platelet
	☑	☐	08/24/2010	Test, Lisa/Lab Results	Glucose, Serum
	☑	☐	08/24/2010	Test, Matt/Lab Results	Lipase, Serum \ Amylase, Serum
	☑	☐	08/24/2010	Test, Dee dee/Lab Results	CBC With Differential/Platelet \ Urine Culture, Routine
!	☑	☐	08/23/2010	Test, Mom/Lab Results	Direct Ag (No CD) \ Magnesium, Serum

☑ New Task ▼   ✕ Delete   Modify   Send   Chart

You can assign a Due Date, Priority, and type a Subject and Description, similar to above.
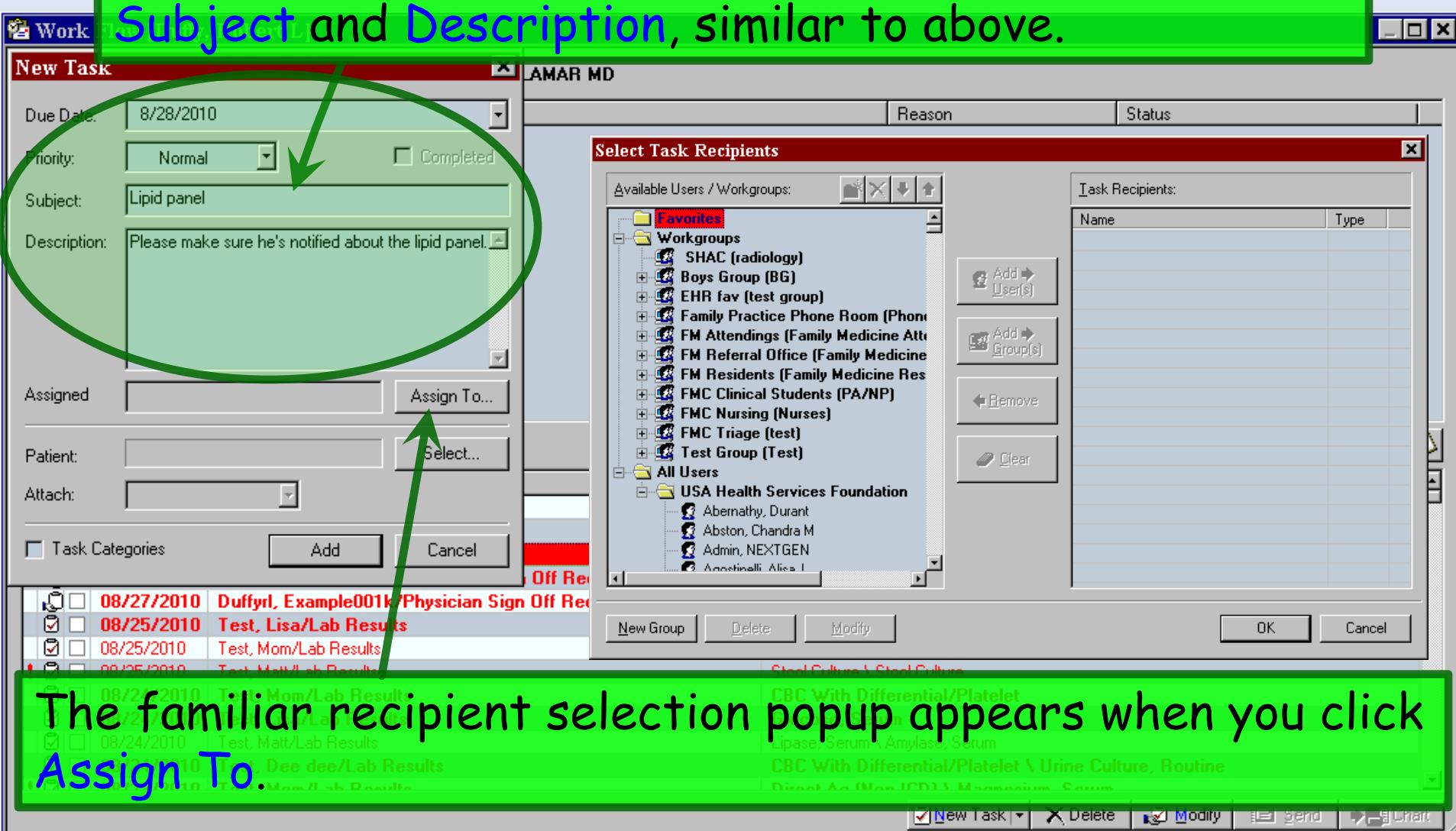
The familiar recipient selection popup appears when you click Assign To.

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, and not associated with a patient.

File   Edit   Default   View   Tools   Admin   Utilities   Window   Help

Logout Save Clear Delete   USA FAMILY MEDICINE ▾ DUFFY, ROBERT LAMAR MD ▾   Patient History Inbox PAQ Templates Documents Medications ICS Apps Close

◀ ▤ 08/19/2010 09:57 PM : "USA Master Im2" ▤ 08/19/2010 09:57 PM : "USA Telephone Call" ✕   ▷ **Patient History** 📌 ✕

Work Flow [Duffy, Robert L]   _ ☐ ✕

New Task   ✕ LAMAR MD

Due Date:

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

Priority: Normal   ☐ Completed

Subject:

Patient Lookup   ✕

Description:

Search Criteria

Last	First / Nickname	Middle	Previous Last	City	Address Line 1	Zip
Quagmire	Nigel					

Social Security Birth Date   Sex   Home Phone   Search By   Med Rec Nbr Policy Nbr   Enc Nbr

`. .` `/ / ` ▾ `( ) -` Med Rec Nl ▾

Assigned

View By   External System   External ID

All Patients ▾   ▾   ☑ Exclude Expired Patients

Patient:

🔒 Birth Date   🔒 L4DSSN

Attach: `/ / `

Matching Records

☐ Task Cal

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

◀ ☑ ☐ 0
☑ ☐ 0
☑ ☐ 0
! ☑ ☐ 0
☑ ☐ 0
☑ ☐ 0
☑ ☐ 0
☑ ☐ 0

Routine

◀ ▶

🗐 Modify   🖃 Send   ➡🖥 Chart

Anticoagula
◀

Records Found: 1

Ready   Clear   Find ▾   New   Open   Close   lduffy   CAP NUM SCRL 08/28/2010

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.)

File Edit Default View Tools Admin Utilities Window Help

Logout Save Clear Delete USA FAMILY MEDICINE ▼ DUFFY, ROBERT LAMAR MD ▼ Patient History Inbox PAQ Templates Documents Medications ICS Apps Close

08/19/2010 09:57 PM : "USA Master Im2" 08/19/2010 09:57 PM : "USA Telephone Call" ✕

Patient History

Work Flow [Duffy, Robert L]

New Task ✕

LAMAR MD

| | Reason | Status |

Due Date: 8/28/2010

Priority: Normal ☐ Completed

Subject: Lipid panel

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

Click Add to finish sending the task.

Assigned Anderson, Brenda; Assign To...

Patient: Quagmire, Nigel Select...

Attach: Template ▼ Adult Finalize Ov

☐ Task Categories 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
08/27/2010 Duffyrl, Example001k/Physician Sign Off Request	sign off request
08/25/2010 Test, Lisa/Lab Results	Yeast Only, Culture
08/25/2010 Test, Mom/Lab Results	CBC With Differential/Platelet
08/25/2010 Test, Matt/Lab Results	Stool Culture \ Stool Culture
08/24/2010 Test, Mom/Lab Results	CBC With Differential/Platelet
08/24/2010 Test, Lisa/Lab Results	Glucose, Serum
08/24/2010 Test, Matt/Lab Results	Lipase, Serum \ Amylase, Serum
08/24/2010 Test, Dee dee/Lab Results	CBC With Differential/Platelet \ Urine Culture, Routine
08/23/2010 Test, Mom/Lab Results	Direct Ag (Non ICD) \ Magnesium, Serum

☑ New Task ▼ ✕ Delete Modify 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, and it may not be clear from the subject line just what the question is. For example, maybe I don't remember Quincy Quagmire, and all we can see from here is that someone took a call from him.

Time	Room	Patient/Subject	Reason	Status	Provider

All Tasks | To Do | Bookmark | L Results | Calls

		Description
!	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
	04/21/2010	Roose, Mgl002/Physician Sign Off Request	sign off request
	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 and confirm it's your patient. You then read the phone message, review the chart, and 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 8/28/2010 ▾ DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

Time ▽	Room	Patient/Subject	Reason	Status	Provider

The bottom line is this: You should almost always accept tasks that you receive, as your first step in figuring out what to do with them.

All Tasks | To Do | Bookmarks | Lab Results | Calls

!	🗅	✓	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
			04/21/2010	Roose, Mgl002/Physician Sign Off Request	sign off request
			04/21/2010		
			04/21/2010	Roose, Mgl005/Physician Sign Off Request	sign off request
				Smith, Mgl005/Physician Sign Off Request	
	🕒	☐	04/20/2010	Liu, Mgl001/Physician Sign Off Request	sign off request
		☐	04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

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

☑ New Task ▾ | ✕ Delete | ☑ Modify | ✉ Send | ➡🗒 Chart

Work Flow [Duffy, Robert L]

1) Double-click on the task.
2) Right-click on the task, and choose Modify.
3) Highlight the task, and click the Modify button.
4) Right-click on the task, and choose Open Patient's Template.
5) Highlight the task, and click the ->Chart button.

| All Tasks | To Do | Bookmarks | Lab Results | Calls |

!	☐	✓	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
				...Sign Off Request	sign off request
			Open Patient's Template	ysician Sign Off Request	sign off request
				ysician Sign Off Request	sign off request
			Modify	ysician Sign Off Request	sign off request
			Delete	sician Sign Off Request	sign off request
			Restore	ysician Sign Off Request	sign off request
			Send	ysician Sign Off Request	sign off request
			Reassign	sician Sign Off Request	sign off request
				cian Sign Off Request	sign off request
			<Refresh>	/Physician Sign Off Request	sign off request

New Task | Delete | Modify | Send | →Chart

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

Task Details

Due Date: 8/27/2010

Priority: Normal

☐ Completed

Subject: Phone call
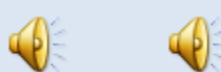
Description: Medical Question

Click ACCEPT.

Assigned by: Jane Smith

REASSIGN...

Patient: Quagmire, Quincy Q

Select...

Attach: Template

USA_telephone_call

☐ Task Categories

ACCEPT

DECLINE

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   Templates   Documents   Images   Procedures   Apps

10/08/2010 11:54 AM : "Intake - OV"   10/08/2010 11:54 AM : "Telephone Call"   ✕

You note the Reason for call is Medical Question, so to respond, click Medical Question.

Navigation

✧ Sticky Note
✧ HIPAA

Communication

✧ Medication Management   ✧ Test Result Request   ✧ Forms/Records   ✧ Other   ✧ Charges
◆ Medical Question   ✧ Referral Request   ✧ Billing Question   ✧ Outgoing Call

Communications   ☐ Send letter to patient due to inability to contact   Display: [   ]

Date	Time	Employee	Reason	Type	Contact By	Comments
10/22/2010	10:44 AM	Regina Williamson	Medical Question	Incoming call	self	Pt doesn't know when next appt should be. Please advise.

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, and you told him to come back in 3 months.

Allergies

Allergy	Reaction
CODEINE	Nausea

Protocols

Td vaccine   / /   10/08/2019
Sigmoidoscopy   / /   / /
Pneumococcal vaccine / /   / /
PAP   / /   07/08/2013
Mammogram   / /   / /
Lipid Panel   / /   / /

▶ Preview Document   ✧ Comments

Ready

Medical Question - Telephone ☒

Call information

Contact type:
[   ]

Time of call: [10:44 AM]   Date of call: [10/22/2010]

Spoke with: Name:
☑ Patient   [   ]

Relationship:
[self   ]

Urgency:
[within 24 hours]

Contact information

Home:
○ [( ) -   ]

Alternate: Ext:
○ [( ) -   ] [   ]

Day: Ext:
○ [( ) -   ] [   ]

Cell:
○ [( ) -   ]

Other: (this call only)   Email:

✻ = Preferred contact

Communication

Concern:
[   ]

Duration of symptoms:
[   ]

▶ Manage My Phrases   ▶ My Phrases

Comment:
Next visit in 3 months; please let him know.

▶ Meds/Allergies/Chronic Problems

◆ Review of Test(s)

Actions

Details: Completed:

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

▶ Admin Action   ▶ Release of Info Log (PHI)

This communication history

▶ Telephone Call Summary

Date	Time	Employee	Comments	Tasked To	
10/22/2010	10:44 AM	Robert L. Duffy	Pt doesn't know when next appt should be. Please advise.	Jonnita Rankin	

Tasking

Priority:
[Normal   ]

▶ Send and Close

▶ Reply and Close   Reply to: [Robert Duffy]

Status: ◉ Open   ○ Complete

[Save and Close]   [Cancel]

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-Rx...
- ⊞ 🖥 FMC Medical Records (Medical Rec...
- ⊞ 🖥 FMC Momcare Case Worker (Social...
- ⊟ 🖥 FMC Nursing (Nurses)
  - 👤 Anderson, Brenda
  - 👤 Bell, Froncean h
  - 👤 Blakely, Djakarta
  - 👤 Clary, Frances
  - 👤 Dunning, Tanginko
  - 👤 Kelley-McLaren, Julie
  - 👤 McMillan, Renetta
  - 👤 Rankin, Jonnita
  - 👤 Spears, Keona
  - 👤 Stanton, Alisha
- ⊞ 🖥 FMC Red Team (Red Team e-Rx R...

Add → User(s)

Add → Group(s)

← Remove

Clear

Task Recipients:

Name	Type
👤 Kelley-McLaren, Julie	User

New Group | Delete | Modify | OK | Cancel

Select your recipient and 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.

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   Templates   Documents   Images   Procedures   Apps

10/08/2010 11:54 AM : "Telephone Call"   ×

Navigation

Alert   Patient Contact Info   View Scheduled Appointments   Telephone Call Summary   PCP:

HIPAA

Your response is added to the grid.

Communication

◆ Medication Management   ◆ Test Result Request   ◆ Forms/Records   ◆ Other   ◆ Charges

◆ Medical Question   ◆ Referral Request   ◆ Billing Question   ◆ Outgoing Call

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

Date	Time	Employee	Reason	Type	Contact By	Comments
10/22/2010	8:42 PM	Robert L. Duffy	Medical Question			Next visit in 3 months; please let him know.
10/22/2010	10:44 AM	Regina Williamson	Medical Question	Incoming call	self	Pt doesn't know when next appt should be. Please advise.

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

Medication	Form	Last Refill		Protocols			☐ Show due within: 36 Months
					due	H&P	10/08/2010
				Tdap	10/09/2009	/ /	10/08/2019
				Sigmoidoscopy		/ /	10/08/2019

Allergies

Allergy	Reaction
CODEINE	Nausea

Pneumococcal vaccine	/ /	/ /
PAP	/ /	07/08/2013
Mammogram	/ /	/ /
Lipid Panel	/ /	/ /

▶ Preview Document   ◆ Comments

File   Edit   View   Tools   Admin   Utilities   Insert   Window   Help

USA FAMILY MEDICINE   ▼   DUFFY, ROBERT LAMAR MD   ▼

Logout Save Clear Delete   Patient History Inbox FAQ Medications Templates Documents Images Procedures Apps

10/22/2010 11:12 AM : "Telephone Call" | 10/22/2010 11:12 AM : Document "telephone_communication   ×

HighEdit

Arial

TELEPHONE MESSAGE

Patient Name   Quincy
Date of Call   10/22/2010
Home phone
Day phone
Alternate phone

Spoke with: |
Time of call: 4:54 PM
Call taken by: Robert L. Duffy
Contact type:
Call type: medical question

Telephone Contact Detail
Date   Time   Employee   Detail
10/22/2010   8:42 PM   Robert L. Duffy   Next visit in 3 months; please let him know.
10/22/2010   10:44 AM   Regina Williamson   Pt doesn't know when next appt should be. Please advise.

Provider: ROBERT LAMAR DUFFY MD 10/22/2010 9:01 PM

Document generated by: Robert L. Duffy¤

This is what the phone note would look like. 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 base templates, the note will still exist.
This task is complete. Click Inbox to return to your task list.

Ready   NGProd USA Health Services Foundation rlduffy   CAP NUM   10/22/2010

Page 1/1   Line 11   Col 14

Work Flow [Duffy, Robert L]

Appointments 8/28/2010 DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

Time	Room	Patient/Subject	Reason	Status	Provider

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

All Tasks | To Do | Bookmarks | Lab Results | Calls

!	□	✓	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
			04/21/2010	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	Liu, Mgl001/Physician Sign Off Request	sign off request
			04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

New Task | Delete | Modify | Send | Chart

Work Flow [Duffy, Robert L]

Appointments 8/28/2010 DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

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.

| All Tasks | To Do | Bookmarks | Lab Results | Calls |

!	D	✓	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
		☐	04/21/2010	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	Liu, Mgl001/Physician Sign Off Request	sign off request
		☐	04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

New Task | X Delete | Modify | Send | Chart

Appointments 8/28/2010 ▼ DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

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

All Tasks | To Do | Bookmarks | Lab Results | Calls

!	◻	✓	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
		◻	04/21/2010	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	Liu, Mgl001/Physician Sign Off Request	sign off request
		◻	04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

☑ New Task ▼ | ✕ Delete | ☑ Modify | ✉ Send | ➡📋 Chart

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, and 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: Quagmire, Quincy Q [Select...]

Attach: Template USA_telephone_call

☐ Task Categories [Update] [Cancel]

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 Nursing (Nurses)
  - Test Group (Test)
- 📁 All Users
  - USA Health Services Foundati
  - Abernathy, Durant
  - 👤 Abston, Chandra M
  - 👤 Admin, NEXTGEN
  - 👤 Agostinelli, Alisa J

Add → User(s)

Add → Group(s)

Task Recipients:

Name	Type

Select the correct recipient, Dr. Johnson, and send the task to him, as previously demonstrated.

The task will immediately drop off of your task list.

New Group | Delete | Modify | OK | Cancel

Appointments 8/28/2010 ▾ DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

Time ▽	Room	Patient/Subject	Reason	Status	Provider

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.

All Tasks | To Do | Bookmarks | Lab Results | Calls

!	☐	✓	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
	🗘	☐	04/21/2010	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	Liu, Mgl001/Physician Sign Off Request	sign off request
		☐	04/20/2010	Tavernarie, Mgl001/Physician Sign Off Request	sign off request

☑ New Task ▾ | ✕ Delete | ☑ Modify | ▤ Send | ⇨ Chart

This concludes the
NextGen task demonstration.

What should you do if you see an endangered
animal eating an endangered plant?