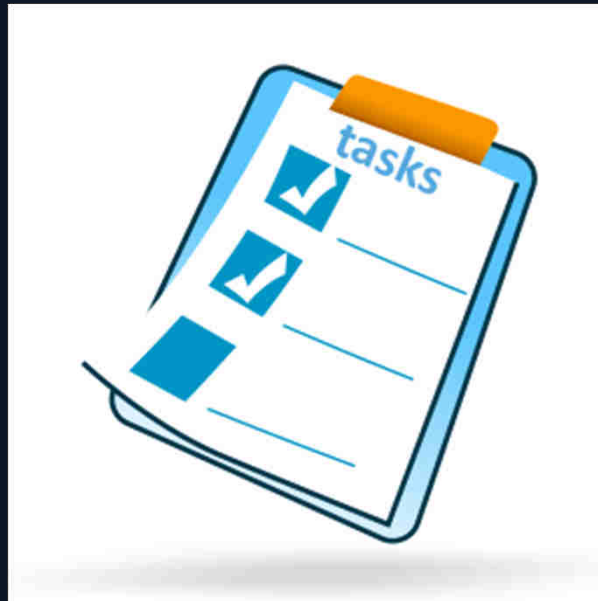


# Tasking



**Help Desk**  
423-282-6122

# Delegated vs. Undelegated Tasks

P	D	Task
*	Y	Call In Failed Rx
	Y	Overdue Order

**Delegated tasks** – system-generated tasks which are routed automatically to the nursing team. These tasks must be completed by doing what the system requires. If you have completed the task, but the task still won't drop off, do NOT remove the task. Undelegate it first, and then reassign it to the Allscripts Help Team.

If the task needs to be seen by the provider, clicking the "Undelegate" button will send it to the provider whose name is in the "Assigned to" field. You may want to check with your office manager or nursing supervisor about the protocol for undelegating tasks.

P	D	Task
		Follow Up
		Follow Up

**Undelegated tasks** – generally tasks which are manually sent from one person to another. These tasks can usually be completed by clicking "Done" on the toolbar.

# Reassigning Delegated Tasks

Select Patient Allergies: Med & Non Med HPhone: |

### Task List

View: Training Task List  Show: 50

P	D	Task	Patient	Assigned To	Created
Y		Call In Failed Rx	ALLSCRIPTS,BETSY	ALLSCRIPTS,Provider	System
Y		Mail Results to Patient	TEST,ETHAN	ALLSCRIPTS,Provider	ALLSCRIP
Y		FMH Update Pharm	TEST,MONACO	ALLSCRIPTS,Provider	System

If you need to reassign a delegated task to someone OTHER than the provider who is listed in the “Assigned to” field, you will need to Undelegate the task first. Otherwise, the doctor will never see it.

1. Highlight task. Click Undelegate.
2. The task will disappear from the nursing task list. Click the drop down and change your view to *Current Patient – Active*.

### Task List

View: Training Task List  Show: 50

P	D	Task	Patient	Assigned To
		Current Patient - Active		
		Current Patient - All		

# Reassigning Delegated Tasks

**ALLSCRIPTS,BETSY** Age: 69 Years DOB: 03/18/1946 MRN: 001000774665401  
Sex: F PCP: FYI: FYI  
Allergies: Med & Non Med HPhone: (423)123-4567 Other:

Select Patient ▼ i - ⚠

### Task List

View: Current Patient - Active View Desc...

P	D	Task	Patient
		Call In Failed Rx	ALLSCRIPTS,BETSY

**Comments:**  
Logan, Jennifer - 25 May 2015 3:30 PM  
UNDELEGATED TASK  
System - 18 May 2015 3:44 PM

Go To... In Progress Done

Undelegate

New... Reply... Reassign... Re

Details... Original... Pr

### Task Reassign -- Webpage Dialog

**Task Reassign**

Patient: ALLSCRIPTS,BETSY Sex: F DOB: 18 Mar 1946 MRN: 001000774665401

Assign To:  User  Team Task: Call In Failed Rx

Priority: Routine Status: Active

Comment:

Comment History:  
Logan, Jennifer - 25 May 2015 3:30 PM  
UNDELEGATED TASK  
System - 18 May 2015 3:44 PM

Text Templates...




OK Cancel

Find the task, click Reassign, and pull in the correct user. Click OK. Now the task will go to that user's My Active Tasks list.

To send a task to the provider whose name IS in the "Assigned To" field, just click the "undelegate" button.

# FMH Messages

**ALLSCRIPTS, SOPHIA** Age: 48 Years DOB: 12/25/1966 MRN: 00100077  
Sex: F PCP: FYI: **FYI**  
Allergies: Med & Non Med H Phone: (423)123-4567 Other:

Select Patient   

### Task List

View: Training Task List  Show: 50

P	D	Task	Patient	Assigned To	Created By	Created On
Y		Mail Results to Patient	TEST,ETHAN	ALLSCRIPTS,Provider	ALLSCRIPTS,Provider	05/19/2015 12:38
Y		FMH Update Pharm	TEST,MONACO	ALLSCRIPTS,Provider	System	05/20/2015 04:30
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System	05/22/2015 04:51

Follow My Health messages that come in from the patients need to be responded to within 48 hours (at the latest). So make sure these are handled before the end of the day (if possible). If they come in to a resident, and the message is something that needs to be addressed ASAP, please ask your office manager how best to handle the situation.

Think of the FMH tasks as another type of phone call – they should all be responded to before the end of the day, whenever possible.

# FMH Messages

**TEST, MONACO** Age: 36 Years DOB: 03/03/1979  
Sex: F PCP: Garrett, H Phone: (423)123-4567  
Allergies: Med & Non Med

### Task List

View: Training Task List Show: 50

P	D	Task	Patient	Assigned To	Created
Y		Call In Failed Rx	ALLSCRIPTS,BETSY	ALLSCRIPTS,Provider	System
Y		Call In Rx	TEST,ISABELLA	ALLSCRIPTS,Provider	System
Y		Mail Results to Patient	TEST,ETHAN	ALLSCRIPTS,Provider	System
Y		FMH Update Pharm	TEST,MONACO	ALLSCRIPTS,Provider	System
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System
Y		Overdue Order	TEST,BOBBY	ALLSCRIPTS,Provider	System
Y		Overdue Order	TEST,ETHAN	ALLSCRIPTS,Provider	System
Y		Overdue Reminders	Allscripts,Alan	ALLSCRIPTS,Provider	System
Y		Overdue Reminders	TEST,BRIDGET	ALLSCRIPTS,Provider	System
Y		Overdue Reminders	TEST,JAMIE	ALLSCRIPTS,Provider	System

**Comments:**  
System - 20 May 2015 4:30 PM  
Patient request to change their preferred pharmacy.

**Follow My Health™ - Preferred Pharmacy Change Request**

**Patient Information**  
Name: TEST,MONACO Sex: F MRN: 001000651682701  
DOB: 03 Mar 1979  
Address: 222 E MAIN ST  
JOHNSON CITY, TN 37604  
Home Phone: (423)123-4567 Work Phone: (423)123-4567 Email:

**New Preferred Pharmacy**  
Name: CVS/PHARMACY #3717 2111 NORTH ROAN STREET #35  
Address: 2111 NORTH ROAN STREET #35  
JOHNSON CITY, Tennessee 37601

**Response to Patient:**

**End Communication**

**Communication History:**  
Sent: Wednesday, May 20, 2015 4:30:12 PM  
Sender: Monaco Test  
Subject: Preferred Pharmacy Update  
Body: Name = CVS/PHARMACY #3717 2111 NORTH ROAN STREET #35  
Address = 2111 NORTH ROAN STREET #35  
JOHNSON CITY, Tennessee 37601

Buttons: Go To..., In Progress, Done, Undelegate, Reply, Cancel

To read a FMH task, double click the task. Read the message in the Communication History. For Update Pharmacy, or other messages that deal with chart modifications, make the updates to the patient's chart, and then in the Response to Patient field, type that you have updated their chart. It's always a good idea to thank them for using the portal, too, as we want to encourage our patients to participate with the portal.

# FMH Messages

Follow My Health - Patient Communication -- Webpage Dialog

## FollowMyHealth™ - Patient Communication

**Patient**

**Name:** ALLSCRIPTS,SOPHIA      **Sex:** F      **MRN:** 001000774639901  
**DOB:** 25 Dec 1966  
**Address:** 123 MAIN ST  
JOHNSON CITY, TN 37604

**Home Phone:** (423)123-4567      **Work Phone:**

**Patient Message:**

Subject: Continuation of Care  
Body: Body: I spoke with Medical Records at Acme Memorial Hospital and was told that if you call them, any records you need can be faxed to you.  
Do you have a release of health information in my file that I signed. Need to get my 2014 Mammogram information from them before I can schedule an appointment to get one done here.

**Response to Patient:**

**End Communication**

**Communication History:**

Sent: Friday, May 22, 2015 4:51:26 PM  
Sender: Sophia Allscripts  
Subject: Continuation of Care  
Body: Body: I spoke with Medical Records at Acme Memorial Hospital and was told that if you call them, any records you need can be faxed to you.  
Do you have a release of health information in my file that I signed. Need to get my 2014 Mammogram information from them before I can schedule an appointment to get one done here.

**Hit Reply again to complete this task without sending a patient response.**

For those instances where a reply is not required, you can just click the “Reply” button twice, and the task will drop off and no response will be sent to the patient.

# Overdue Reminders - Order

Y	OverDue Reminders	TEST,BOBBY	ALLSCRIPTS,Provider	System	05/25/2015 12:11	Active
---	-------------------	------------	---------------------	--------	------------------	--------

---

**Comments:**

System - 25 May 2015 12:11 PM  
Overdue Reminders

**Task About:**

Mammogram - Screening - Bilateral  
Schedule Mode: Recurrence  
Schedule: 6 months  
Due: 25 Nov 2014

If you get an overdue reminder, and the patient is in the office for a visit, you can order the item and make the task go away. To do this, double click on the task to take you to the patient's Clinical Desktop. Click on the HMP/Reminders tab.

Item	Schedule	S	Go	Most Recent	Dat	5y	To Do	Incc
Health Maintenance								
Education...				Complete	04N			
Nutrition for...				Complete	05D			
Smoking, stop				Complete	21N			
Mammogram - ...	Q 6 months						⚠ Due: ...	
Ophthalmology ...	Q 1 year			Complete	13N		Permanentl...	
1 month Follow up				Complete	04D			
1 week Follow up				Complete	28A			
10 day Follow up				Complete	18O			
10 month Follow...				Complete	04D			



# Overdue Reminders - Order

The screenshot shows a software interface for managing reminders. At the top, there are tabs for 'HMP/Reminders' and 'Growth Chart'. Below these are tabs for 'Vital Signs', 'Meds', 'Med FlowSheet', 'Orders', 'Allergies', and 'Immunizations'. The main area displays a table of reminders with columns: Item, Schedule, S, Go, Most Recent, Dat, and 5y. A red banner indicates 'Filter Applied: Suppress Other Orders'. A context menu is open over the '5y' column of the 'Mammogram' row, with the 'Order' option highlighted. The table data is as follows:

Item	Schedule	S	Go	Most Recent	Dat	5y
Health Maintenance		<input type="checkbox"/>				
Education...		<input type="checkbox"/>		Complete	04N	
Nutrition for...		<input type="checkbox"/>		Complete	05D	
Smoking, stop		<input type="checkbox"/>		Complete	21N	
Mammogram -...	Q 6 months	<input type="checkbox"/>				
Ophthalmology...	Q 1 year	<input type="checkbox"/>		Complete	13N	Permanently...
1 month Follow up		<input type="checkbox"/>		Complete	04D	
1 week Follow up		<input type="checkbox"/>		Complete	28A	
10 day Follow up		<input type="checkbox"/>		Complete	18O	
10 month Follow...		<input type="checkbox"/>		Complete	04D	
2 month Follow up		<input type="checkbox"/>		Complete	04D	
2 week Follow up		<input type="checkbox"/>		Complete	13S	
3 month Follow up		<input type="checkbox"/>		Complete	10J	

At the bottom of the interface, there is a toolbar with buttons: 'Order', 'Create Reminder', 'Edit', 'Last Done', 'Done Today', and 'Renew w/ Changes'.

Right click in the **To Do** field, and click **Order**

# Overdue Reminders - Order

Order Details  
TEST, BOBBY 36 YO F DOB: 03Mar1979 Appointment 05/22/2015

Mammogram - Screening - Bilateral

For: [2] Breast cancer screening, high risk patient; Health Maintenance

Status: Active

To Be Done: 25May2015

Order Results Goals

Details Questions Add'l Details Charging Encounters History Annotations

Details

Perform: Radiology Facility

Print Requisition Routine Print Copy

Ordered By: ALLSCRIPTS, Provider

Supervised By: ALLSCRIPTS, Provider Authorization: Not Required

Managed By: ALLSCRIPTS, Provider

CC Results

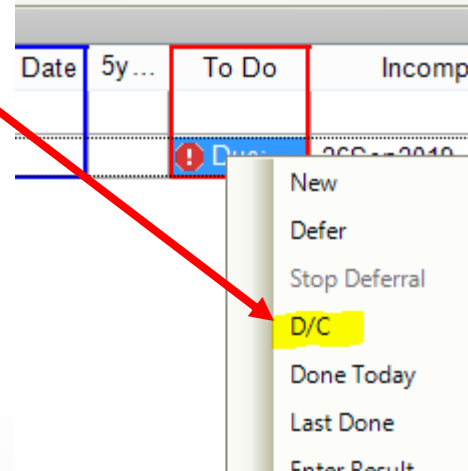
Performing Instructions: 255 Chars remaining

Cite Result

Patient

**Note:** The task will not drop off for this until the order has been completed.

*Right Click on  
Reminder, and  
choose D/C.*



If you want to Complete the Overdue Reminders task, you will need to wait until the order is completed or D/C the Reminder.

If you D/C the Reminder and want a new Reminder, then you will need to create it.

# Overdue Reminders – Completing

MRN: 001000641273801  
FYI: FYI  
Other:

es root beer suckers

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Orders Allergies

Health Management Problem Refresh

Filter Applied: Suppress Other Orders

Item	Sch...	S	G...	Most Recent	D...
Cataract		<input type="checkbox"/>			
Vision Screen	Q 6...	<input type="checkbox"/>			
Infective endocarditis		<input type="checkbox"/>			
Scurvy		<input type="checkbox"/>			
Visit for screening...		<input type="checkbox"/>			
Health Maintenance		<input type="checkbox"/>			
Other Medications		<input type="checkbox"/>			

Right click in the To Do field and choose the appropriate option:

- **Defer** – allows you to do a temporary or permanent deferral
- **D/C** – discontinues the reminder
- **Done Today** – indicates that the test was done today
- **Last Done** – lets you put in a date when the test was completed

# Overdue Reminders – Completing

If you choose the “Last Done” option, it allows you to put in a date, which completes the reminder on the HMP tab and drops the Overdue Reminder task from the task list.

Choosing “D/C” simply discontinues the reminder and drops it off the task list.

HMP/Reminders | Growth Chart

Vital Signs | Meds | Med Flowchart | Orders | Allergies | Immunizations

Health Management | Problem | Refresh | [Icons]

Filter Applied: Suppress Other Orders:

Item	Sc...	S	Go	Most...	Date
Cataract					
Vision Screen			Complete		22May2015

[R] TEST, JANET    Age: 60 Years    DOB: 07/12/1954    MR

Select Patient    Sex: F    PCP: ALLSCRIPTS, Internist    FYI

Allergies: Med Only    H Phone: (423)477-0954    Oti

### Task List

View: Clinical Task List    View Desc...    Show: 50

P	D	Task	Patient	Assigned To	Created By
Y		Call In Failed Rx	ALLSCRIPTS,BETSY	ALLSCRIPTS,Provider	System
Y		Call In Rx	TEST,ISABELLA	ALLSCRIPTS,Provider	System
Y		Mail Results to Patient	TEST,ETHAN	ALLSCRIPTS,Provider	ALLSCRIPTS,Provide
Y		FMH Update Pharm	TEST,MONACO	ALLSCRIPTS,Provider	System
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System
Y		Overdue Order	TEST,BOBBY	ALLSCRIPTS,Provider	System
Y		Overdue Order	TEST,ETHAN	ALLSCRIPTS,Provider	System
Y		OverDue Reminders	Allscripts,Alan	ALLSCRIPTS,Provider	System
Y		OverDue Reminders	ALLSCRIPTS,BETSY	ALLSCRIPTS,Provider	System
Y		OverDue Reminders	Allscripts,Chris	ALLSCRIPTS,Provider	System

# Overdue Reminders – Temporary Deferral

The screenshot shows the 'Health Management Reminder Details' window for a patient named ALLSCRIPTS, BETSY, 69 YO, F, DOB: 16Mar1946. The window is titled 'Health Management Reminder Details' and has a red header bar with the patient name and 'Chart Update: 05/21/2015'. The main content area is divided into sections for 'Recurrence' and 'Age Based'. The 'Recurrence' section has radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', with 'Yearly' selected. Below this is a 'Start Date' section with a calendar icon and a date field set to '10Sep2013'. The 'Age Based' section has a 'Years' section with a grid of buttons from 5 to 110. At the bottom, there are checkboxes for 'Order First Instance' and 'Defer Temporarily' (which is checked), and a 'Defer until' field with a calendar icon. The 'Planned by' field is set to 'ALLSCRIPTS, Family IV'. The 'Defer Reason' and 'Free Text Reason' fields are also visible.

The 'Select a Date' dialog box is open, showing a calendar for June 2015. The date '23' is selected. The dialog has a 'Jump' section with '2' months and 'Today' button. The 'Selection' field shows '23JUNE2015'.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

To temporarily defer a reminder, **right click**, choose **Defer – Temporary Deferral**. In the Defer until box, click the calendar and put in a date. Click OK.

# Overdue Reminders – Temporary Deferral

Mammogram...		<input type="checkbox"/>	<u>Ne</u>	Complete	22	
Pap Smear	Q...	<input type="checkbox"/>		Complete	14J	Deferred 23Jun2015
<input type="checkbox"/> Prothrombin...		<input type="checkbox"/>		Complete	25	

This places the deferred date on the HMP/Reminders table, and drops the task from the task list.

We have seen instances where the task did not drop off after doing the temporary deferral. If that happens, reassign the task to the Allscripts Help Team and we'll take care of it.

# Overdue Reminders – Permanent Deferral

Health Management Reminder Details

[R] ALLSCRIPTS, BETSY 69 YO F DOB: 18Mar1946

Frequency: Daily, Weekly, Monthly, Yearly (selected)

Every 1 years

Start: 25May2013

When no previous instance exists in the patient's chart

End Date: No End Date, End After: 1 occurrences, End By:

Age Based

Years: 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, 75, 80, 85, 90, 95, 100, 105, 110

Order First Instance

Planned by: ALLSCRIPTS, Provider

Defer Temporarily, Defer until:

Defer Permanently

Deferral Reason: Patient Cancelled Procedure

(50 Chars)

Annotations

Audit

OK Cancel

To permanently defer a reminder, **right click**, choose **Defer – Permanent Deferral**. The Deferral Reason box is a required field (even though it's not yellow). You will have to put in a Deferral Reason before you can click OK on this screen. The HMP will show that this reminder was permanently deferred.

<input type="checkbox"/> Health Maintenance		<input type="checkbox"/>					
Annual...	Q 1...	<input type="checkbox"/>				Perma...	
Colonoscopy ...		<input type="checkbox"/>	Complete	1...			

# Overdue Reminders – From the Encounter Selector

The screenshot displays a medical software interface for patient TEST, MITCHELL. The patient's age is 82 Years, sex is M, and allergies are Med & Non. The interface includes a toolbar with various icons, a 'My Alerts' section listing overdue reminders, and a context menu for the 'Annual Depression Screening' reminder.

**My Alerts**

- ⚠️ Smoking status is not documented
- ⚠️ Pravastatin Sodium 80 MG Oral Tablet; TAKE 60 MG Every 8 hours; Therapy: 25Jun2014 to (Evaluate:22Dec2014); Last Rx:25Jun2014; Status: ACTIVE Ordered
- ⚠️ Carbinoxamine Maleate 4 MG Oral Tablet; TAKE 1 TABLET 3 TIMES DAILY AS NEEDED; Therapy: 07Aug2014 to (Evaluate:12Aug2014); Last Rx:11Aug2014; Status: ACTIVE Ordered
- ⚠️ Levofloxacin 500 MG Oral Tablet (Levaquin 500 MG Oral Tablet); TAKE 1 TABLET After meals TDD:3; Therapy: 11Aug2014 to (Evaluate:09Dec2014); Last Rx:11Aug2014; Status: ACTIVE Ordered
- ⚠️ Annual Depression Screening 3 months; Overdue:02/10/2015
- ⚠️ CBC Automated Differential 3 months; Overdue:08/28/2014
- ⚠️ Diabetic Foot Exam 3 months; Overdue:05/13/2015
- ⚠️ Eye Exam 3 months; Overdue:05/13/2015

**Context Menu for Annual Depression Screening:**

- Edit
- View
- Order
- Last Done
- Done Today
- Enter Result
- Temporary Deferral
- Permanent Deferral
- Move to All Other Alerts

You can also handle Overdue Reminders from the Encounter Selector screen. From the Clinical Toolbar, click the Encounter Selector icon, then right click on the Overdue Reminder.



# Overdue Orders


**TEST,BOBBY**

Select Patient   

Age: 36 Years    DOB: 03/03/1979    MRN: 001000647052001  
 Sex: F    PCP: Bochis, Melania    FYI: FYI  
 Allergies: Med & Non Med    H Phone: (423)111-1111    Other:

**Task List** [Personalize](#)

View: Training Task List    [View Desc...](#)    Show: 50

Total Active Tasks: 1  
 Last Updated: 05/25/2015 3:47 PM 

P	D	Task	Patient	Assigned To	Created By	Created On	Status	ID	Due	MRN
Y		Mail Results to Patient	TEST,ETHAN	ALLSCRIPTS,Provider	ALLSCRIPTS,Provider	05/19/2015 12:38	Active	3031618		001000778162801
Y		FMH Update Pharm	TEST,MONACO	ALLSCRIPTS,Provider	System	05/20/2015 04:30	Active	3036644		001000651682701
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System	05/22/2015 04:51	Active	3043403		001000774639901
Y		FMH Patient Message	ALLSCRIPTS,SOPHIA	ALLSCRIPTS,Provider	System	05/22/2015 04:52	Active	3043405		001000774639901
Y		Overdue Order	TEST,BOBBY	ALLSCRIPTS,Provider	System	05/17/2015 03:45	Active	3025525		001000647052001
Y		Overdue Order	TEST,ETHAN	ALLSCRIPTS,Provider	System	05/23/2015 10:15	Active	3043701		001000778162801
Y		OverDue Reminders	Allscripts,Alan	ALLSCRIPTS,Provider	System	05/25/2015 01:59	Active	3044345		120710142609537
Y		OverDue Reminders	TEST,BRIDGET	ALLSCRIPTS,Provider	System	05/25/2015 03:00	Active	3044379		00100055558601
Y		OverDue Reminders	TEST,JAMES	ALLSCRIPTS,Provider	System	05/25/2015 03:02	Active	3044380		001000663422401
Y		OverDue Reminders	TEST,KYLE	ALLSCRIPTS,Provider	System	05/25/2015 03:04	Active	3044381		001000655960301

**Comments:**

System - 17 May 2015 3:45 PM  
 Overdue Order

**Task About:**

Provider: ALLSCRIPTS,Provider  
 Ordering Provider: ALLSCRIPTS, Provider  
 Hematology/Oncology Referral  
 To Be Done: 17 Apr 2015  
 Overdue: 05/17/2015

[Go To...](#)    [In Progress](#)    [Done](#)  
[Undelegate](#)

[New...](#)    [Reply...](#)    [Reassign...](#)    [Remove...](#)    [Copy To Note](#)  
[Details...](#)    [Original...](#)    [Print List...](#)    [Print Task...](#)

Overdue orders simply require research. Research and good documentation. Single click on an Overdue Order to see the order. The “Task About” field will give you the name of the ordering provider, the order, the To Be Done date, and the overdue date. Once you know what order to look for, double click on the task.

# Overdue Orders

The screenshot shows a medical software interface with the following elements:

- Navigation tabs: HMP/Reminders, Growth Chart, Vital Signs, Meds, Med Flowsheet, **Orders**, Allergies, Immunizations, Flowsheets.
- Order list filters: All Orders, Status, Alpha.
- Order list items:
  - CSF Glucose; (Green smiley face icon)
  - Entered in Error - Training
    - \* Biopsy - Liver; (Green smiley face icon)
    - CBC Automated Differential; (Red sad face icon)
  - Hold For - Scheduling
    - Mammogram - Screening - Bilateral; Requested for: 19Sep2019; (Green smiley face icon and red exclamation mark icon)
  - Temporary Deferral - Report Pending
    - Behavioral Health Referral - Frontier Health - - (Green smiley face icon)

Go to the Orders tab and find the order. You may need to go to All Orders and scroll down to see the Temporary Deferral. Basically, you need to find out if the patient had the test done/went to the referral visit, and also, if that result/letter is back in the chart.

# Overdue Orders

If the Radiology or Lab test is complete and we have the results in the chart, you can simply right click on the order and choose Completed On, and put in the appropriate date.

The screenshot displays a medical software interface with a patient's information at the top: DOB: 03/03/1979, MRN: 001000647052001, PCP: Bochis, Melania, FYI: FYI, and H Phone: (423)111-1111. Below this, there are tabs for 'Task List', 'Worklist', 'Printing Tasks', and 'Patient Lists'. A 'line Allergy' section is visible. The main area shows 'Current Orders' with a list of items: 'Abdominal lipoma' (with a warning icon), 'Breast cancer screening, high risk p' (with a smiley icon), 'Cholelithiasis', and 'HTN (hypertension), benign' (with smiley icons). The 'Breast cancer screening' order is expanded to show 'Mammogram - Screening - Bi' with a due date of '25May2015'. A context menu is open over the 'Breast cancer screening' order, listing various actions such as 'New...', 'InfoButton', 'Cancel', 'View', 'Edit', 'Enter Result', 'Send eReferral Response', 'Enter Goal', 'Annotate', 'View Annotations', 'Renew', 'Renew with changes', 'Void', 'Authorize', 'Continue', 'Add On Orders', 'Completed Today', 'Completed On' (highlighted), 'Order D/C', 'Record D/C', and 'Stop Deferral'. The bottom of the screen has tabs for 'Laboratory', 'Radiology', and 'Follow Up'.

# Overdue Orders

If the referral's report is in the chart, you complete the order and check the *Specialist Response Received*.

SUPERUSER, Loislane 01-Jan-1979 (40 years) F

**Behavioral Health Referral - Frontier Health**

For: [1] Anxiety about health

Status: Complete

To Be Done: 26Sep2019

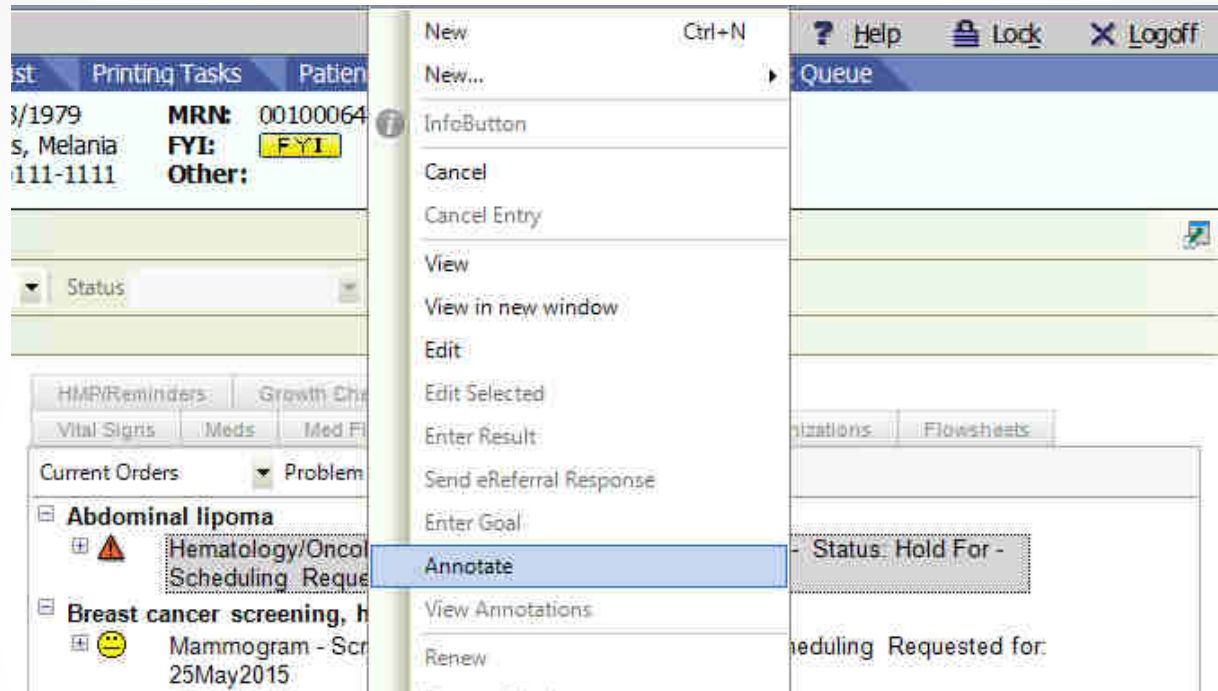
Overdue: 26Oct2019 04:44PM

Recipient:

First Available Provider

Specialist Response Received  Record w/o Ordering

# Overdue Orders



If they have not had the test done (or the referral), call the patient and ask if they are going to have it done. Once you have called, **right click** on the order and choose **annotate**. Write the date/time you called (or left a voice mail) and what the patient said about having the test done. Annotating the order lets anyone who is viewing the patient's chart (including the doctor) know what is going on in regards to the order.

# Overdue Orders

Task: Filters History

Patient: TEST,BOBBY Sex: F DOB: 03 Mar 1979 MRN: 001000647052001

Assign To: User Team Task: Overdue Order

ALLSCRIPTS,Provider All Priority: Routine Status: Active

Comment: Called pt on 5/25/15. Left vm. Asked her to call us back.

Comment History: System - 17 May 2015 3:45 PM Overdue Order

Text Templates...

Activate: 17 May 2015 3:45 PM Overdue: 31 May 2015 3:45 PM

Create Notify Task When: Complete Overdue

Notify: All Priority:

Delegate

OK Cancel

Reply... Details... Original... Print List...

Once the order has been annotated, it's a good idea to edit the task, too, since multiple people generally work these task lists.

With the task highlighted, click Details, and in the Comment field, type what was done.

The next person that views the task will see that the patient was called. You can also mark the task as "In Progress" if you share the task list with other nurses.

In Progress

	Parent Message	ALLSCRIPTS,SOPIHA	ALLSCRIPTS,PROVIDER
Y	Overdue Order	TEST,BOBBY	ALLSCRIPTS,Provider
Y	Overdue Order	TEST,ETHAN	ALLSCRIPTS,Provider
Y	OverDue Reminders	Allscripts.Alan	ALLSCRIPTS.Provider

**Comments:**

Logan,Jennifer - 25 May 2015 4:15 PM  
 TASK EDITED  
 Called pt on 5/25/15. Left vm. Asked her to call us back.  
 System - 17 May 2015 3:45 PM  
 Overdue Order

# Call In Failed Rx

**Call In Failed Rx:** Often, these occur because the resident (or a nurse) accidentally leaves their name in one of the 3 ordering fields. Because they are not enrolled in the electronic prescribing program, their prescription is sent via fax, instead of electronically. If the pharmacy is completely electronic, and doesn't have a fax machine (like WalMart, etc.), the script fails.

To handle these, call in the prescription, and if the resident is still in the office, you may want to remind them not to leave their name in those fields. As you all know, it's easy to forget, but it causes extra work for you, and inconveniences the patient, so feel free to remind your residents not to do this!

**(This is MEAC residents only – does NOT apply to the Family Medicine residents!)**

## BuPROPion HCl - 100 MG Or

13May2015      **Start Date:** 04May2015  
**Dispensed:** Days: 30      **Qty:** 30 (Tablet)

**Status:** Active

**Ordered by:** Copeland,Rebecca  
**Last Updated By:** Copeland,Rebecca  
**Managed by:** Green,Jason

# Rx Renew Requests

Y	Overdue Order
Y	Rx Renew Request
Y	Overdue Order
Y	Overdue Order
...	...

Rx Renew Requests – double clicking this task pulls up a window where you can renew the medication. The patient's current meds, allergies and vitals are available in the panel on the right, and all you have to do is review the information and approve or deny the Rx.

The screenshot displays the RxRenewal application window. The main area shows a renewal request for **LISINAPRIL-HCTZ 10/12.5MG TABLETS**. Key details include: QTY: 90 TAB, Rx By: Copeland, Rebecca, Notes From: Walgreen Drug Store, Last Filled: 10Feb2015, Date Written: 12May2015, and Last Dispensed On: 10Feb2015. The drug dropdown is set to Lisinopril-Hydrochlorothiazide 10-12.5 MG Oral Tablet. Patient information shows Wt: 77.62 Kg, Ht: 171.45 cm, and BSA: 1.90. The SIG section is configured for **TAKE 1 TABLET BY MOUTH DAILY** with a duration of 90 days and a quantity of 90. At the bottom, there are 2 Active Renewal Tasks for the same medication, with 'Approve' and 'Deny' buttons highlighted in a red box. On the right, the 'Meds' panel lists current medications: Aspirin 81 MG Oral Tablet Delayed Release, Citalopram Hydrobromide 40 MG Oral Tablet, and Lisinopril-Hydrochlorothiazide 10-12.5 MG Oral Tablet. The 'Allergies' panel shows a medication allergy for Ceclor CAPS.



# Expired Orders

P	D	Task	Patient	Assigned To	Created By	Created On
Y		Call Patient with results		Holmes,Sheri	Holmes,Sheri	05/21/2015 09:32
Y		Expired Order		Rouse,Ann	System	05/24/2015 01:02
Y		Med Renewal Due		Olsen,Martin	System	05/21/2015 01:08
Y		Overdue Order		Sarkodie,Olga	System	05/11/2015 04:00
Y		Overdue Order		Olsen,Martin	System	05/14/2015 09:45
Y		Overdue Order		Sarkodie,Olga	System	05/14/2015 09:45
Y		Overdue Order		Sarkodie,Olga	System	05/14/2015 10:45

Comments:	Task About:
System - 24 May 2015 1:02 AM Endocervical Currettage (ECC) requires Expired Order	Endocervical Currettage (ECC) Pathology Canceled - Expired

Expired orders are just notifications that an order has expired. Most of the orders are set to expire after one year. If everyone is working the Overdue Orders, you shouldn't see many of these, as most orders will be permanently deferred before they expire. However, if you do get one, you may want to undelegate it and send it to the provider so that they are aware that the patient never had the test done.

If the provider is aware, these tasks should be "**Done.**" (NEVER removed).