Tasking

Help Desk
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May 26, 2015
Delegated vs. Undelegated Tasks

**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.

**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

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.
Reassigning Delegated Tasks

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.
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 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.
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.
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

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.
Right click in the To Do field, and click Order
Overdue Reminders - Order

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

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

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.
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

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.
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.
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

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.
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.
Overdue Orders

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

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.
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).