



TouchWorks EHR Upgrade Version 20

Tasks

Go-Live Date 05/24/2021

Tasks- Out of Office

- Tasks now have an Out of Office option.
- Accessible from the Tasks page, at the top right, click the gear box.
- Out of Office is also accessible from the Site Map, under the Customization header, choose Tasks – Customize.

CUSTOMIZATION

My Security Account (Desktop...)	Print Tasks - Customize
My Preferences	Schedule - Customize
My Macros	Charge - Customize
My Favorites	Pt Lists - Customize
Print Defaults	Queue - Customize
Task Views - Manage My	Calls - Customize
Task Views - Add/Edit My	My Security Account
Tasks - Customize	2nd Factor
Document Tasks - Customize	

- To open, click the gear box on the upper right side on the task window.

Tasks - Customize

Default Assigned To: ☒ User ☐ Team

Automatic Refresh: minutes

☒ Always Show Note Selector When Copy Task to Note

Default Assigned To User

Default Assigned To:

Default Task Type:

Default Assigned To Team

Default Assigned To:

Default Task Type:

Default User Assigned To CoSign and Co-Sign Task

Assigned To:

Default User Assigned To FMH Patient Message Task

Assigned To:

Out of Office

☒ Turn on Out of Office replies

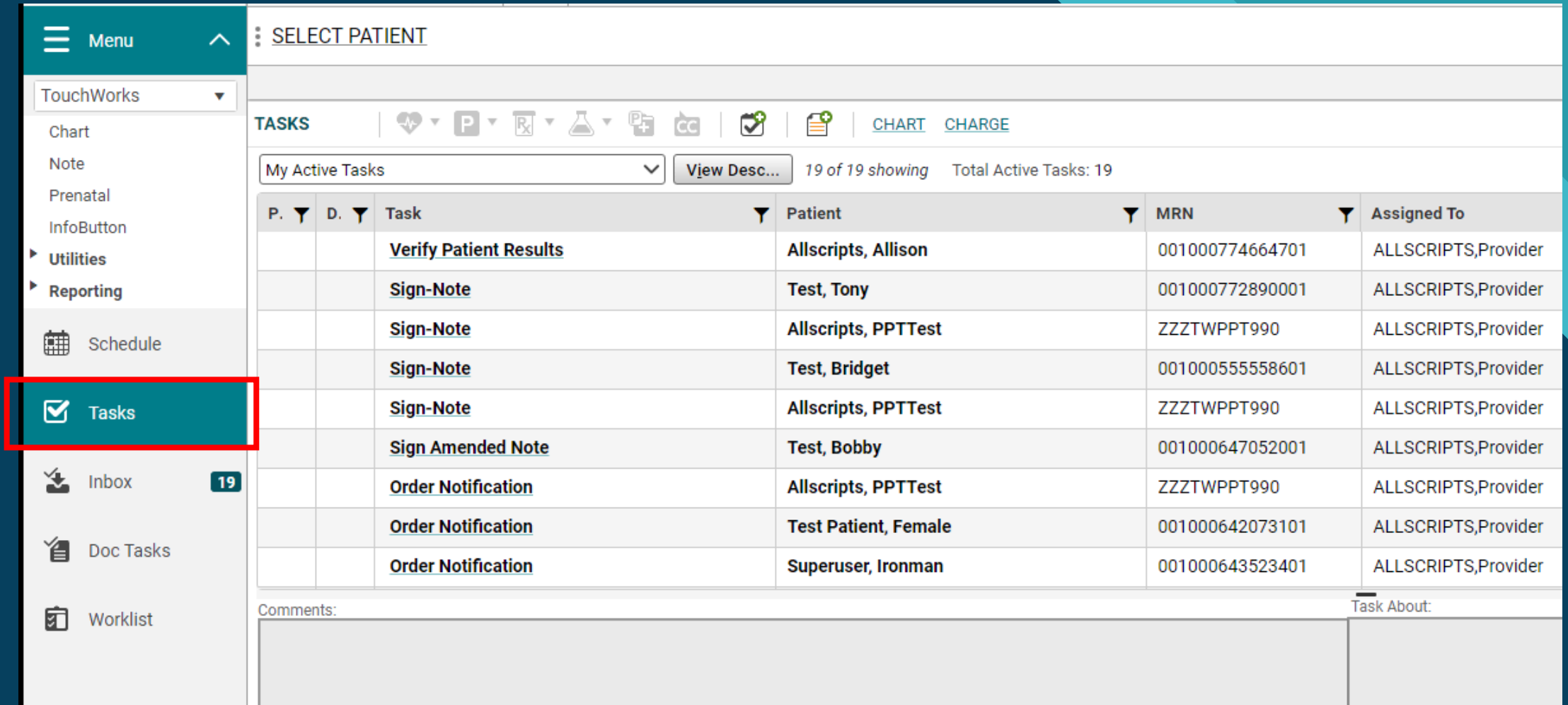
Start Date: End Date:

Out of Office Contact:

91 chars remaining

Tasks

- Tasks functionality hasn't changed.



Menu

- TouchWorks
- Chart
- Note
- Prenatal
- InfoButton
- Utilities
- Reporting
- Schedule
- Tasks**
- Inbox 19
- Doc Tasks
- Worklist

SELECT PATIENT

TASKS

My Active Tasks View Desc... 19 of 19 showing Total Active Tasks: 19

P.	D.	Task	Patient	MRN	Assigned To
		Verify Patient Results	Allscripts, Allison	001000774664701	ALLSCRIPTS,Provider
		Sign-Note	Test, Tony	001000772890001	ALLSCRIPTS,Provider
		Sign-Note	Allscripts, PPTTest	ZZZTWPPT990	ALLSCRIPTS,Provider
		Sign-Note	Test, Bridget	001000555558601	ALLSCRIPTS,Provider
		Sign-Note	Allscripts, PPTTest	ZZZTWPPT990	ALLSCRIPTS,Provider
		Sign Amended Note	Test, Bobby	001000647052001	ALLSCRIPTS,Provider
		Order Notification	Allscripts, PPTTest	ZZZTWPPT990	ALLSCRIPTS,Provider
		Order Notification	Test Patient, Female	001000642073101	ALLSCRIPTS,Provider
		Order Notification	Superuser, Ironman	001000643523401	ALLSCRIPTS,Provider

Comments: Task About:

Inbox

- Inbox is a new way to look at tasks as well.
- The functionality remains the same: Go To..., Done, In Progress, Undelegate, Assign To.
- It has a more “email-like” look.
- You can see the History of the task.

The screenshot displays the TouchWorks medical software interface. On the left is a navigation menu with options like Chart, Note, Prenatal, InfoButton, Utilities, Reporting, Schedule, Tasks, Doc Tasks, and Worklist. The 'Inbox' option is highlighted with a red box and shows a count of 19. The main area is titled 'INBOX' and shows a list of tasks under 'MY ACTIVE TASKS'. The first task is 'Sign-Note TEST, Tony', assigned to ALLSCRIPTS, Provider, created on 12-Feb-2021, 4:31 pm. The right panel shows the details for this task, including buttons for 'Go To...', 'Done', 'In Progress', and 'Undelegate'. It also shows fields for 'Assign To' (User), 'Priority' (Routine), and 'Status' (Active). A 'Comments' section shows a system message: 'System - 12-Feb-2021 4:31 pm: Note needs finalization signature.' At the bottom, a 'HISTORY' section shows the task ID (8916904), creation time (12-Feb-2021 4:31 pm), and system changes.

Menu

TouchWorks

Chart

Note

Prenatal

InfoButton

Utilities

Reporting

Schedule

Tasks

Inbox 19

Doc Tasks

Worklist

INBOX

MY VIEWS

MY ACTIVE TASKS 19

Filter

Showing 19 of 19

Sign-Note TEST, Tony

Assigned To: ALLSCRIPTS, Provider

Created On: 12-Feb-2021, 4:31 pm

Sign-Note ALLSCRIPTS, PPTTest

Assigned To: ALLSCRIPTS, Provider

Created On: 12-Apr-2021, 3:06 pm

Sign-Note TEST, Bridget

Assigned To: ALLSCRIPTS, Provider

Created On: 19-Apr-2021, 4:24 pm

Verify Patient Results

CURRENT PATIENT - ACTIVE 8

CURRENT PATIENT - ALL 541

MY DELEGATED TASKS 33

PEDS - BHC - TASK VIEW 16

PEDS BHC TEAM 0

PEDS MSHA ED TASKS 0

PEDS SOWK TEAM 0

OTHER USERS' VIEWS

BRIGGS, MONACO 20

LIVINGSTON, AMANDA 13

Sign-Note ALLSCRIPTS, PPTTest

Assigned To: ALLSCRIPTS, Provider

Created On: 28-Apr-2021, 3:23 pm

Sign Amended Note TEST, Bobby

Assigned To: ALLSCRIPTS, Provider

Created On: 03-May-2021, 2:56 pm

Order Notification ALLSCRIPTS, PPTTest

Assigned To: ALLSCRIPTS, Provider

Created On: 12-Apr-2021, 4:24 pm

Order Notification TEST PATIENT, Female

Assigned To: ALLSCRIPTS, Provider

Created On: 22-Apr-2021, 12:20 pm

Order Notification SUPERUSER, Ironman

Assigned To: ALLSCRIPTS, Provider

Created On: 22-Apr-2021, 1:33 pm

FYI TEST, Bridget

Assigned To: ALLSCRIPTS, Provider

Created On: 14-Apr-2021, 10:57 am

FYI

TEST, Tony 11-Aug-2020 (8m) M

Sign-Note

Go To... Done In Progress Undelegate

Reply Reassign Copy to Note Print

Assign To User Team

Priority Routine

Status Active

Note Date: 12-Feb-2021 04:31 pm

Note Type: Consult

Note Owner: ALLSCRIPTS, Provider

Comments

System - 12-Feb-2021 4:31 pm

Note needs finalization signature.

ADDITIONAL DETAILS

Save Cancel

HISTORY

Task ID: 8916904

Created: 12-Feb-2021 4:31 pm System

Changed: 12-Feb-2021 4:31 pm

Remove Reason:

CUSTOM FILTERS

Other Users' Views

- Ability to see other user's "My Active Tasks."
- You can set these up. You will no longer need to contact the Helpdesk to get a view of your nurse's tasks, your out-of-town colleagues, or your residents.
- In the example on the right, Dr. Provider Allscripts can also see and work the "My Active Tasks" of Monaco Briggs, and Amanda Livingston.
- These are only visible on the Inbox page.

○ Logged in as Provider Allscripts.

The screenshot displays the TouchWorks interface. The left sidebar shows the 'TouchWorks' dropdown menu with options like 'Chart', 'Note', 'Prenatal', 'InfoButton', 'Utilities', 'Reporting', 'Schedule', 'Tasks', 'Doc Tasks', and 'Worklist'. The 'Inbox' view is selected, showing 19 items. The central pane displays 'MY VIEWS' with a list of tasks and a section for 'OTHER USERS' VIEWS'. The right pane shows patient details for 'TEST, Allscripts'.

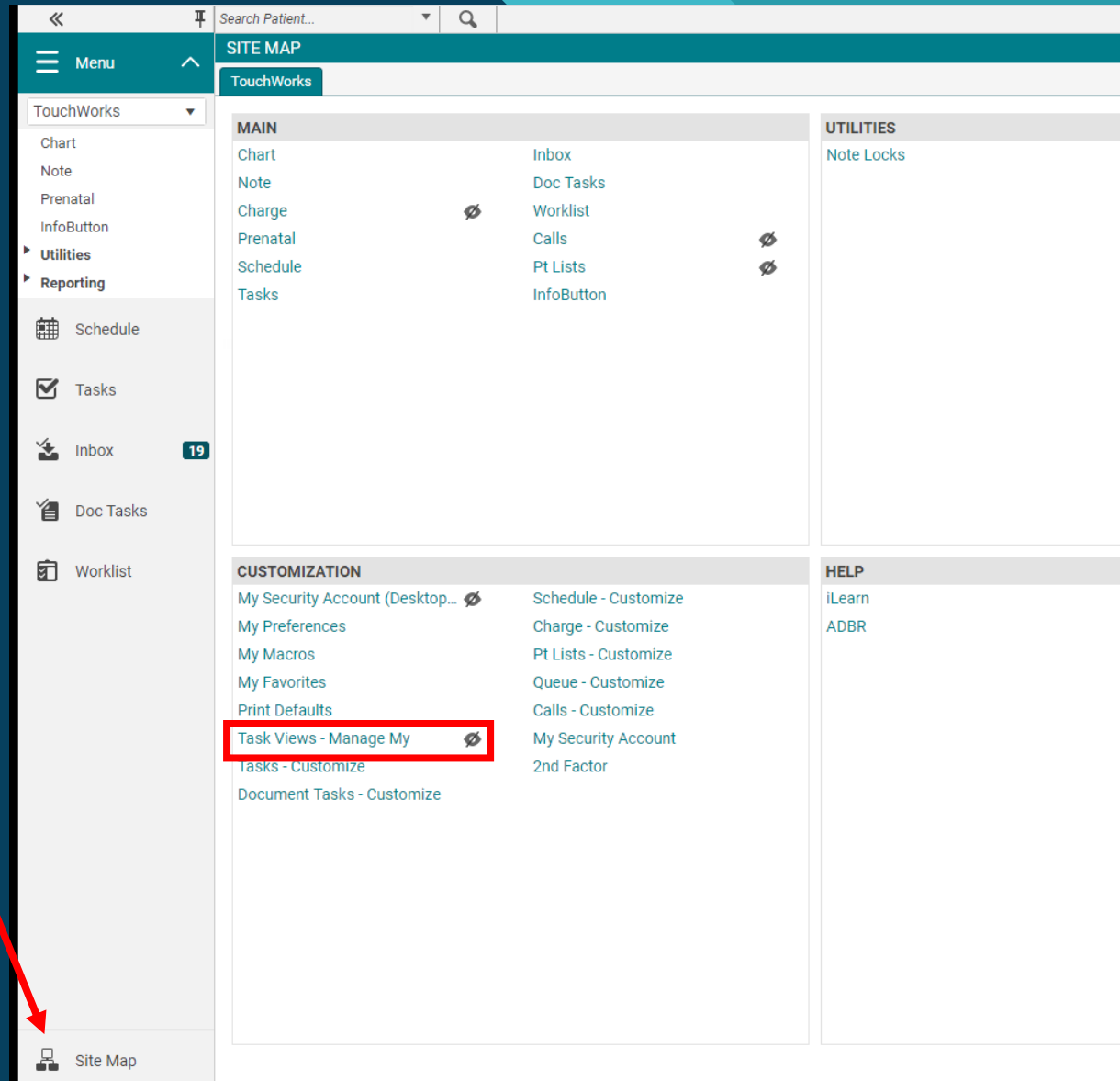
View	Count
Inbox	19
Doc Tasks	
Worklist	

View	Count
MY ACTIVE TASKS	19
Authorize Order	2
Call Back	1
Co-Sign Note	3
FYI	3
Finish Note	1
Order Notification	3
Sign Amended Note	1
Sign-Note	4
Verify Patient Results	
CURRENT PATIENT - ACTIVE	6
CURRENT PATIENT - ALL	30
MY DELEGATED TASKS	33
PEDS - BHC - TASK VIEW	16
PEDS BHC TEAM	0
PEDS MSHA ED TASKS	0
PEDS SOWK TEAM	0

View	Count
OTHER USERS' VIEWS	
BRIGGS, MONACO	20
LIVINGSTON, AMANDA	11
MY ACTIVE TASKS	11

Setting up Other Users' Views

- From the Site Map under Customization, you will choose *Task Views-Manage My*.



Tasks Views-Manage My

- You can Copy (add) an individual's "My Active Tasks."
- This is probably the most beneficial.
- You can also copy Team views.
- Nursing most likely to want to copy Team Views.

1. Select the user you want to copy from. (Remember to search using magnifying glass.)
2. Select which box you want to Copy.
3. Select the > arrow to add to your view.
4. Teams go on the top section and "My Active Tasks" are assigned on the bottom section.
5. Save

TASK VIEWS - MANAGE MY INBOX

Enterprise:

Copy from User:

☐ SELECT ALL

My Active Tasks	
Current Patient - Active	Show only Active tasks for the Current Patient
Current Patient - All	Show all tasks for the Current Patient
Peds - BHC - Task View	
Peds - Continuity - Overdue	
Peds - Continuity - Task View	Daily tasks for the resident physicians in their continuity clinics
Peds - Front Desk Tasks	Tasks to be worked by the front desk
Peds - General - Overdue	
Peds - General - Task View	Daily tasks for the general pediatric team
Peds - Referrals Team	Tasks assigned to the Peds Referral Team
Peds Appointments	
Peds BHC Team	
Peds MSHA ED Tasks	
Peds SOWK Team	

Define Views for:

Out of Office: ALLSCRIPTS, Provider

USER VIEWS

My Active Tasks

Current Patient - Active

Current Patient - All

My Delegated Tasks

Peds - BHC - Task View

Peds BHC Team

Peds MSHA ED Tasks

Peds SOWK Team

OTHER USERS' VIEWS

My Active Tasks [Briggs, Monaco]

My Active Tasks [Livingston, Amanda]

Inbox updated

- From my example, Dr. Provider Allscripts can now see the “My Active Tasks” of Dr. Pediatrician Allscripts.

The screenshot displays the Allscripts Inbox interface. The top navigation bar includes icons for various functions and links to CHART and CHARGE. The left sidebar shows a hierarchy of views under 'MY VIEWS' and 'OTHER USERS' VIEWS'. The main content area lists tasks for 'SUPERUSER, Rogue', including a 'Call Back' task assigned to ALLSCRIPTS, Pediatrician, created on 07-May-2021, 9:41 am.

MY VIEWS

- MY ACTIVE TASKS** (19)
 - Authorize Order (2)
 - Call Back (1)
 - Co-Sign Note (3)
 - FYI (3)
 - Finish Note (1)
 - Order Notification (3)
 - Sign Amended Note (1)
 - Sign-Note (4)
 - Verify Patient Results (1)
- CURRENT PATIENT - ACTIVE** (1)
- CURRENT PATIENT - ALL** (5)
- MY DELEGATED TASKS** (33)
- PEDS - BHC - TASK VIEW** (16)
 - PEDS BHC TEAM (0)
 - PEDS MSHA ED TASKS (0)
 - PEDS SOWK TEAM (0)

OTHER USERS' VIEWS

- ALLSCRIPTS, PEDIATRICIAN** (1)
 - MY ACTIVE TASKS** (1)
- BRIGGS, MONACO** (20)
 - MY ACTIVE TASKS** (20)
- LIVINGSTON, AMANDA** (11)
 - MY ACTIVE TASKS** (11)

Task Details:

- Call Back**
- SUPERUSER, Rogue**
- Assigned To: ALLSCRIPTS, Pediatrician
- Created On: 07-May-2021, 9:41 am

Annotations:

- A red arrow points from the 'MY ACTIVE TASKS' link under 'ALLSCRIPTS, PEDIATRICIAN' to the 'MY ACTIVE TASKS' link under 'BRIGGS, MONACO'.
- A red arrow points from the 'checkmark-plus' icon in the top navigation bar to a callout box.
- A red arrow points from the 'checkmark-plus' icon in the callout box to the 'Start new task' text.

Callout Box:

- Use the checkmark-plus sign icon to start a new task from the Inbox page.
- Start new task**

Doc Tasks

- Doc tasks replace Batch Sign tab.
- Shows you just the notes you need to sign.

The screenshot displays the TouchWorks medical software interface. On the left sidebar, the 'Doc Tasks' icon is highlighted with a red box. The main content area is divided into two panes. The left pane, titled 'My Active Tasks', lists tasks for a patient, with 'Test, Bridget' selected. The right pane shows the medical note for 'Bridget Test', dated 19 Apr 2021. The note includes sections for Chief Complaint (Arm Pain), Reason For Visit (Follow-up from ER), History of Present Illness, Review of Systems (all normal), and Active Problems (Abdominal cramping, cardiovascular function studies, and advanced diabetic maculopathy). A red arrow points from the 'Doc Tasks' icon to the 'Sign' button at the bottom of the note.

Menu

TouchWorks

- Chart
- Note
- Prenatal
- InfoButton
- Utilities
- Reporting
- Schedule
- Tasks
- Inbox 17
- Doc Tasks
- Worklist
- Site Map

TEST, Bridget 08-Aug-2004 (16y) F | Break Glass PCP Cell (423) 545-5555 Home (423) 555-5556

Need new phone number Hearing Impaired PCP*

DOC TASKS

My Active Tasks

P Patient

- Allscripts, PPTTest
- Allscripts, Sophia
- Test Patient, Female
- Test, Bobby
- Test, Bridget
- Test, Tony

1 Document

Acute (Acute) 19 Apr 2021 03:19 PM ALLSCRIPTS, Provider Needs Input

Note needs finalization signature.

CC

Chief Complaint

1. Arm Pain

Reason For Visit

Follow-up from ER. Initial evaluation. ER Follow Up. test one two
Parental Concerns: nervous
Infectious Contact: dad

History of Present Illness

gghjgkjgkjhk
once upon a time not long ago...

The Language Line was used at today's visit.
Name of Interpreter: julio rogridguez
Interpreter Number: 423-555-4949

Bridget Test, a 16 year old female presents today with complaints of left, right arm pain.

Review of Systems

The review of systems was reported by the parent/guardian.

Constitutional: Normal.
Eyes: Normal.
ENT: normal.
Cardiovascular: Normal.
Respiratory: Normal.
Gastrointestinal: Normal.
Genitourinary: Normal.
Musculoskeletal: Normal.
Integumentary: Normal.
Neurological: Normal.
Psychiatric: Normal.
Endocrine: Normal.
Hematologic/Lymphatic: Normal.

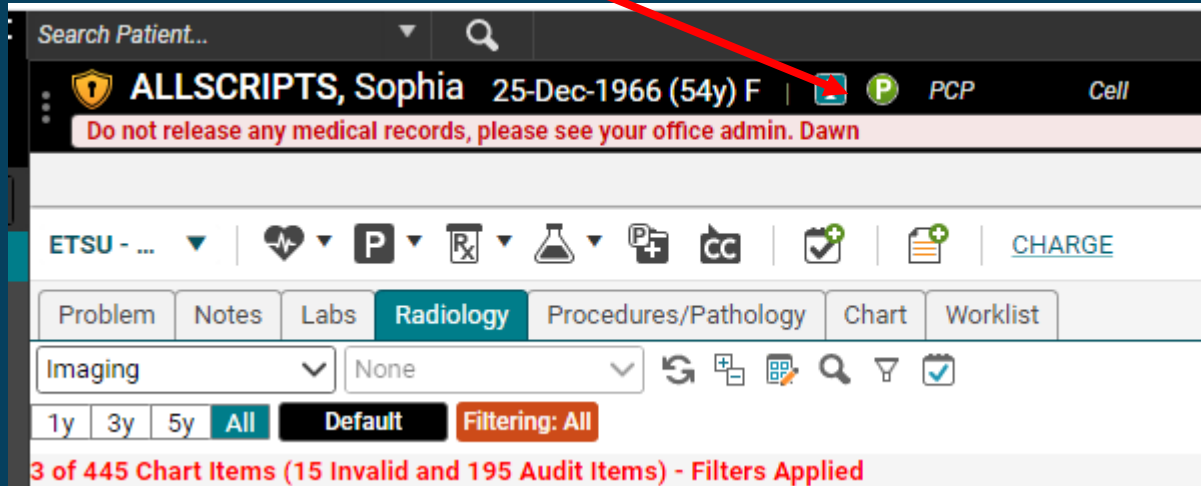
Active Problems

1. Abdominal cramping (R10.0)
2. Abnormal results of cardiovascular function studies (R94.30)
3. Advanced diabetic maculopathy with retinopathy and macular edema associated with

Request Correction Security Text Final Sign Attach to Result Edit

Send a patient Follow My Health message

- You can easily send a patient a FMH message by clicking the green P in the patient banner.



Search Patient...

ALLSCRIPTS, Sophia 25-Dec-1966 (54y) F | **P** PCP Cell

Do not release any medical records, please see your office admin. Dawn

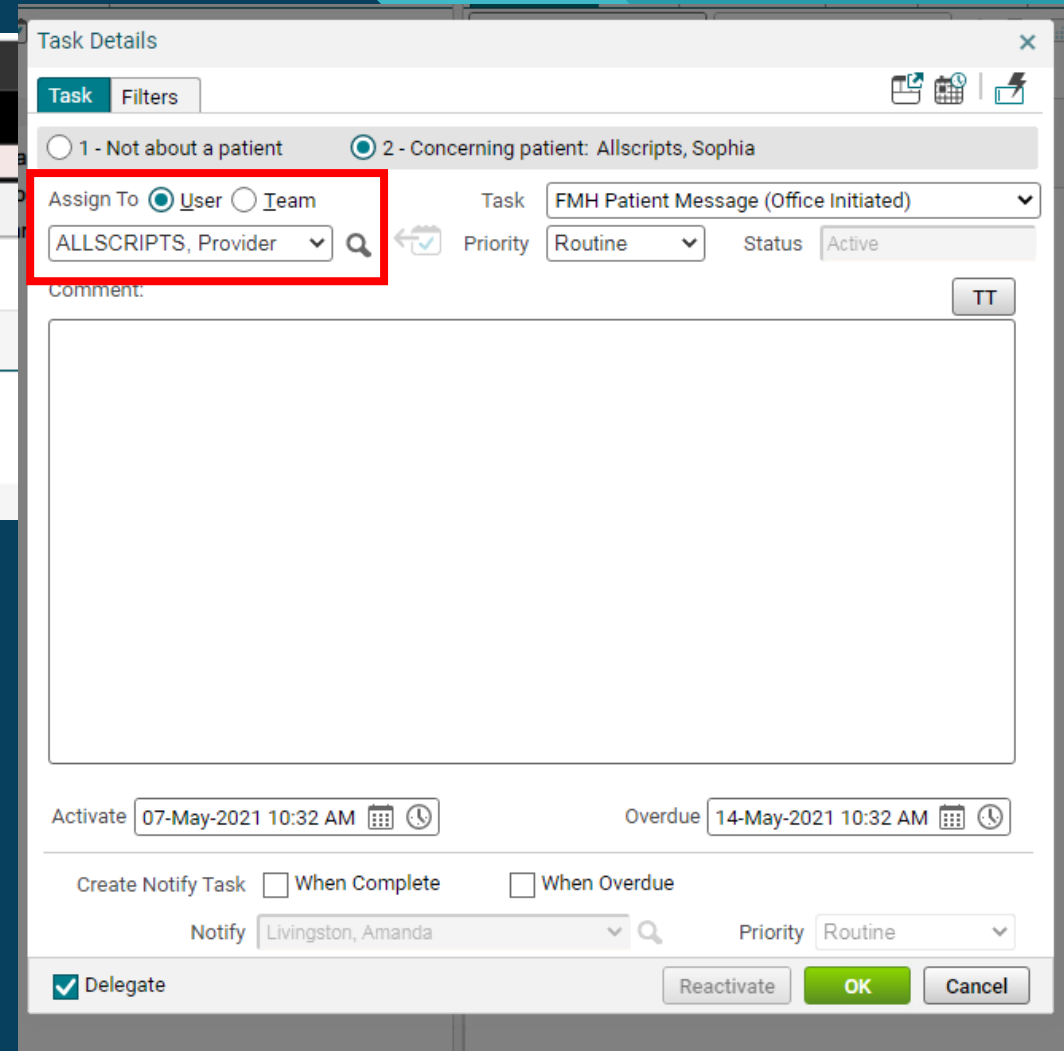
ETSU - ... | **P** | **Rx** | **+** | **CC** | **+** | **+** | **CHARGE**

Problem Notes Labs **Radiology** Procedures/Pathology Chart Worklist

Imaging None **1y** **3y** **5y** **All** **Default** **Filtering: All**

3 of 445 Chart Items (15 Invalid and 195 Audit Items) - Filters Applied

- The Assign to User field needs to be a Provider's name.
- It essentially acts like "From the office of *Provider Allscripts*"



Task Details

Task Filters

☐ 1 - Not about a patient ☒ 2 - Concerning patient: Allscripts, Sophia

Assign To ☒ User ☐ Team

ALLSCRIPTS, Provider

Task FMH Patient Message (Office Initiated)

Priority Routine Status Active

Comment:

Activate 07-May-2021 10:32 AM Overdue 14-May-2021 10:32 AM

Create Notify Task ☐ When Complete ☐ When Overdue

Notify Livingston, Amanda Priority Routine

☒ Delegate

FMH Not Read Receipt- New task type

- If the patient hasn't read a FMH message by the overdue date, a FMH Not Read Receipt task is created.
- Task is delivered as Delegated (to the clinical staff).
- *This task type is still being tested.*

Y	FMH Not Read Receipt	Allscripts, Cameron	ZZZTW05	twprovider,TwProvider	System
Comments:					
System - 07-Jan-2020 3:49 am					
Overdue message from FollowMyHealth.com.					
				Task About:	
				Subject: Overdue: E: GGGGGG	
				Body: TEST	
				Team Ferrari, M.D.	

- You can change the overdue date when you create the FMH message by using the calendar.

Task Details

Task Filters

☐ 1 - Not about a patient ☒ 2 - Concerning patient: Allscripts, Sophia

Assign To ☒ User ☐ Team Task FMH Patient Message (Office Initiated)

ALLSCRIPTS, Provider Priority Routine Status Active

Comment: TT

Activate 07-May-2021 10:32 AM

Overdue 14-May-2021 10:32 AM

Create Notify Task ☐ When Complete ☐ When Overdue

Notify Livingston, Amanda Priority Routine

☒ Delegate Reactivate OK Cancel

Can no longer Reassign Verify Patient Results tasks

- You can no longer forward a “Verify Patient Results” task to another provider.
- It doesn't work from the Task List.
- It does work from the Worklist!
- You will need to Update Provider from the Worklist page.

The screenshot displays the EHR interface with two main panels. The top panel, titled 'My Active Tasks', shows a task list with columns for Patient, Task, and Assigned. A task 'Verify Patient Results' is listed for 'Allscripts, So'. The bottom panel, titled 'WORKLIST', shows a patient 'ALLSCRIPTS, Sophia' with a 'Resulted - Requires Verification' status. A table of test results is visible, including 'Hemoglobin A1C' and 'Estimated Average Glucose (C)'. A red arrow points to the 'Update Provider' button in the bottom right corner of the Worklist panel. Another red arrow points to the 'Assign To' dropdown menu in the 'Verify Patient Results' task details, which is crossed out with a red X, indicating that reassignment is no longer possible.

P.	D.	Task	Patient
		Verify Patient Results	Allscripts, So

Test	Result	Flag	Reference
Estimated Average Glucose (C)	8.3		

Update Provider

Update Provider

TEST, Friday 17-May-1999 (21y) F Chart Update: 07-May-2021

Update the Following Results: Hemoglobin A1C

With the Following Attributes:

Ordered By: Livingston, Amanda 🔍

☒ Verification Required

Annotation:

NOT TO NEW PROVIDER

OK Cancel

- Use magnifying glass to search for provider if not in dropdown.
- These Annotations are on the RESULTS not a message to the new Provider.