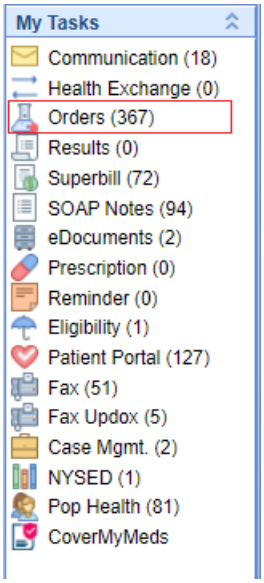
Orders

Last Modified on 09/04/2025 9:56 am EDT

My Tasks - Orders | Overview

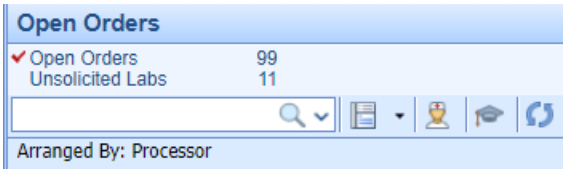
The My Tasks - Orders section is used to process orders placed by the providers or ancillary staff. The primary purpose of this section is to manage the list of orders assigned to you and/or your assigned user groups, also known as the processor. This list can be arranged to suit the needs of each user.

This section will be used to Add Order Fulfillment Details, Print Requisitions, Input Authorization Details, and Search for Additional Orders.



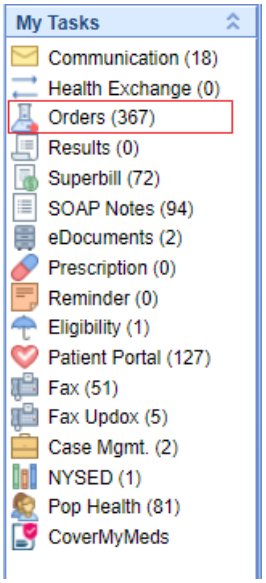
Select an Order in the My Task List

Within the My Tasks - Orders category there are two categories listed beneath the "**Open Orders**" heading, Open Orders and Unsolicited Labs. The focus of this article will be the Open Orders and will describe the process to select an order.

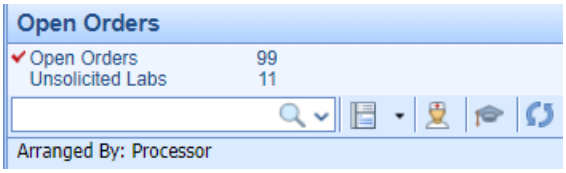


Steps to Complete

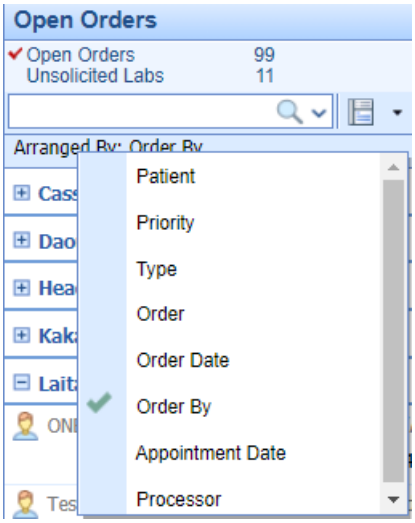
1. Navigate to **My Tasks - Orders**



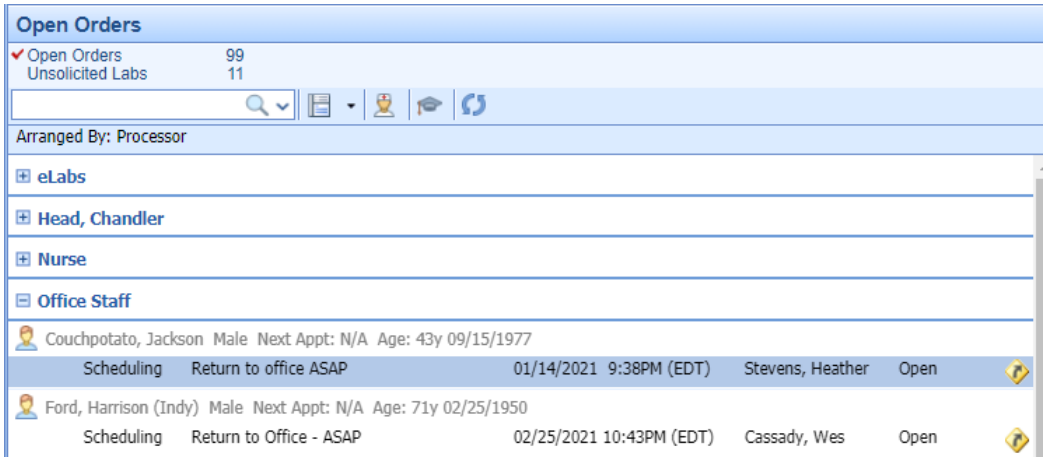
2. Select **Open Orders**



3. If you have not already done so, **set the Arranged By**.



4. Find the order in the displayed list. **Click on the item** and the details will be displayed in the viewing pane.



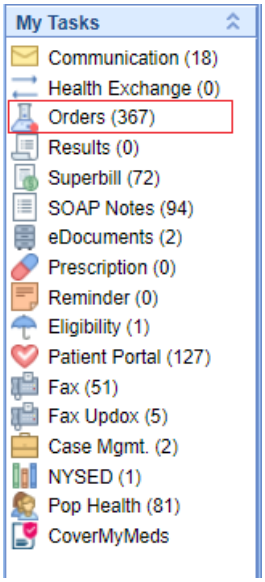
Select Multiple Orders
From the list, you can either select and **right-click** over a single order or select multiple orders at once by using SHIFT+Click and/or CTRL+Click.

Print a Requisition from My Task Orders

A Requisition, the PDF containing the details of an order that has been placed, can be generated from either the My Task - Orders section or from the history section of Order Entry. This article describes the steps to print/transmit requisitions for one or more orders using the My Tasks List.

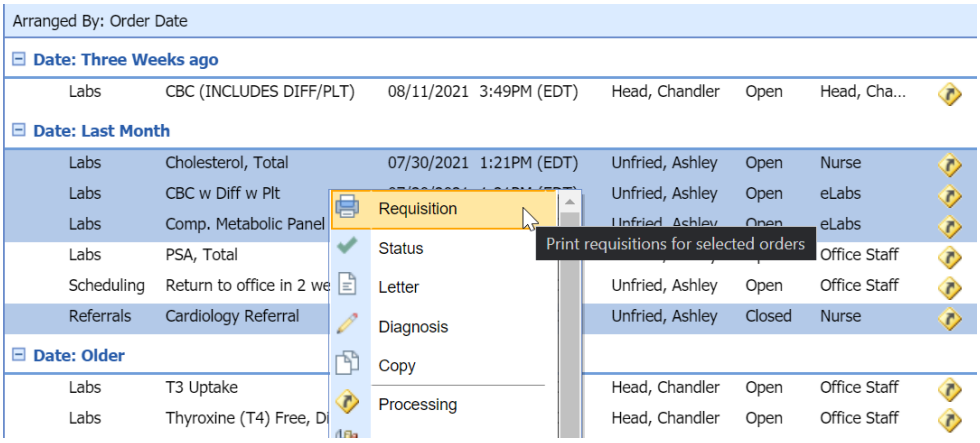
Steps to Complete

1. After Placing an Order in the Order Entry Chart Tab.
2. Navigate to **My Task - Orders**

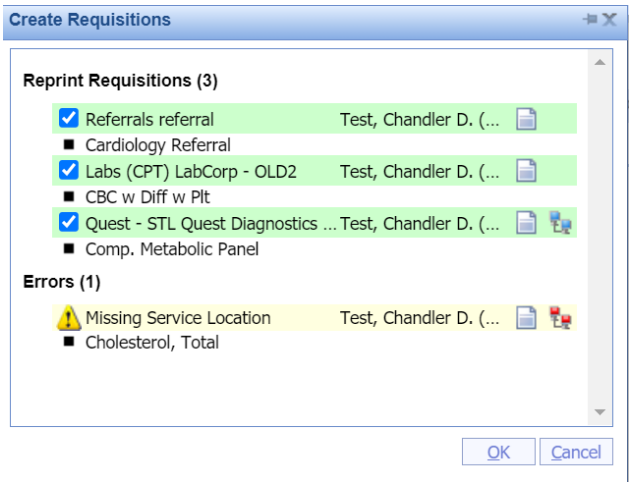


3. From the list of Open Orders, you can either select and **right-click** over a single order or select multiple orders at once by using SHIFT+Click and/or CTRL+Click. **Select Requisition** (More Info On Selecting

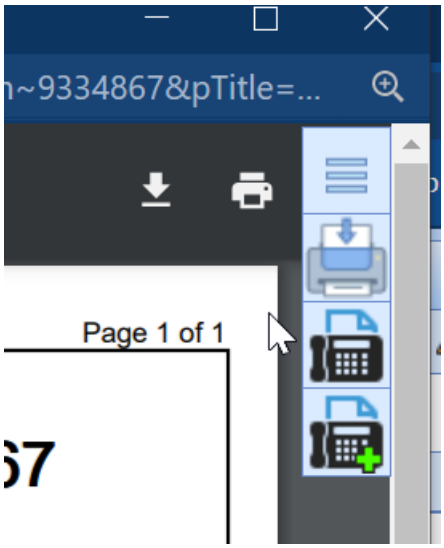
Orders)



4. The Create Requisitions screen will display the groupings for the order you are going to print and errors that may need to be resolved first.



5. After selecting **OK,** the PDFs will be generated and you will be able to **Fax** the form, **Add it to the Patient's Print/Fax Queue**, or **Print** the requisition. If you have an Interface, this may transmit the order to the facility depending on the type of interface.

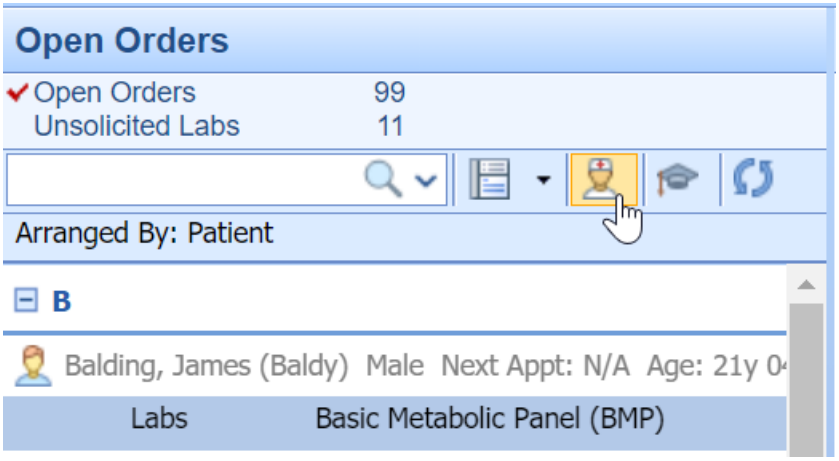


Open Patient in the EMR from My Task Orders

When processing orders via the My Task list, you may need to reference clinical information about the patient. You can open a patient's chart in the EMR from this section with the click of a button. This article describes these steps.

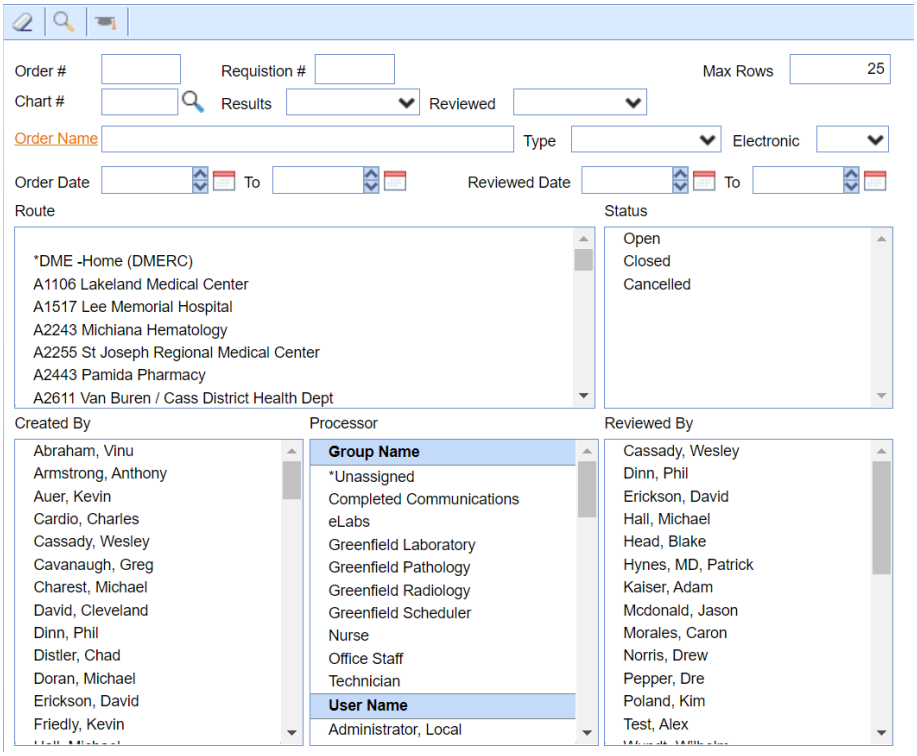
Steps to Complete

1. Navigate to **My Task - Orders**
2. Select an Order
3. Once a single order has been selected, **Open Patient in the EMR** from the icon in the toolbar.



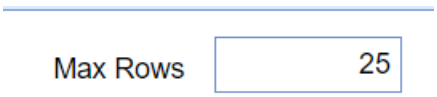
Complete an Advanced Search for Orders

The My Task - Orders list will display all open orders assigned to your user as the processor and/or your assigned user group. In the event, you would like to search for orders outside of your queue you may perform an Advanced Search to return a list of orders that meet specific criteria.

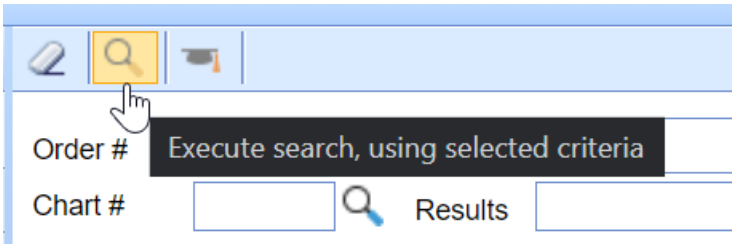


Steps to Complete

1. Navigate to the **My Task - Orders**
2. Using the **Search Field Dropdown, Select Advanced Search**
3. Using the available criteria:
    - Order #
    - Chart #
    - Requisition #
    - Results
    - Reviewed
    - Order Name
    - Type
    - Electronic (Electronic Orders are those that have a connected interface)
    - Order Date - From/To
    - Reviewed Date - From/To
    - Route
    - Status
    - Created By
    - Processor
    - Reviewed By
4. Set your **Max Rows** to ensure your return the comprehensive list of results.



5. Once you enter your search criteria, select the **Magnifying Glass** icon from the toolbar.

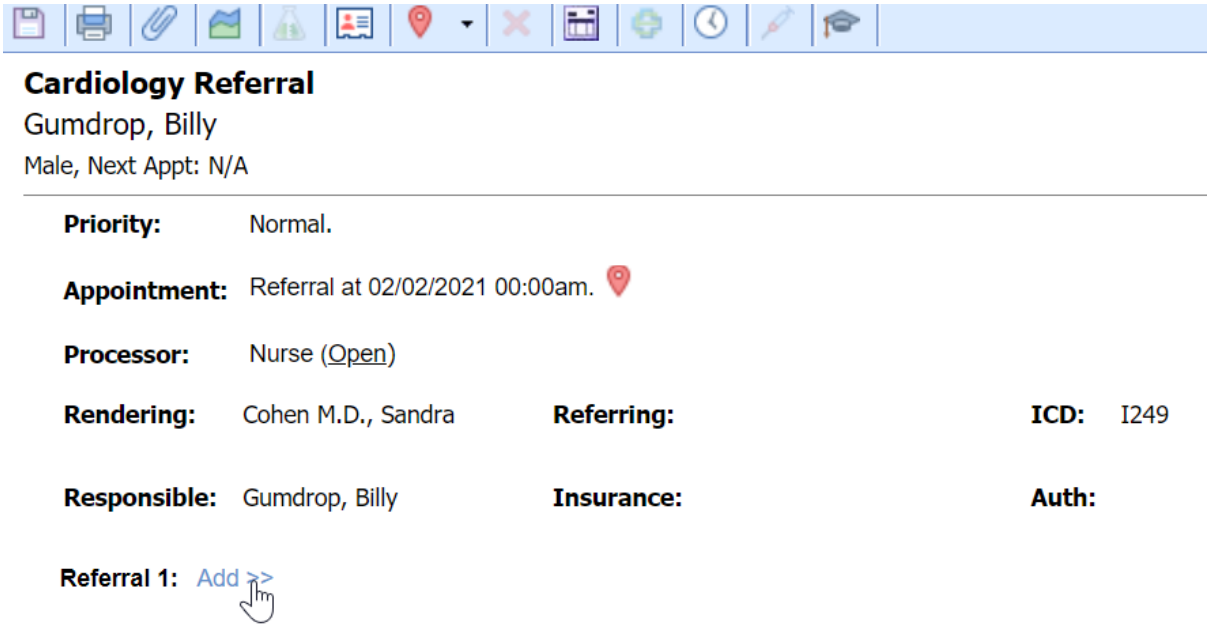


Complete Order Fulfillment Details via My Task - Orders

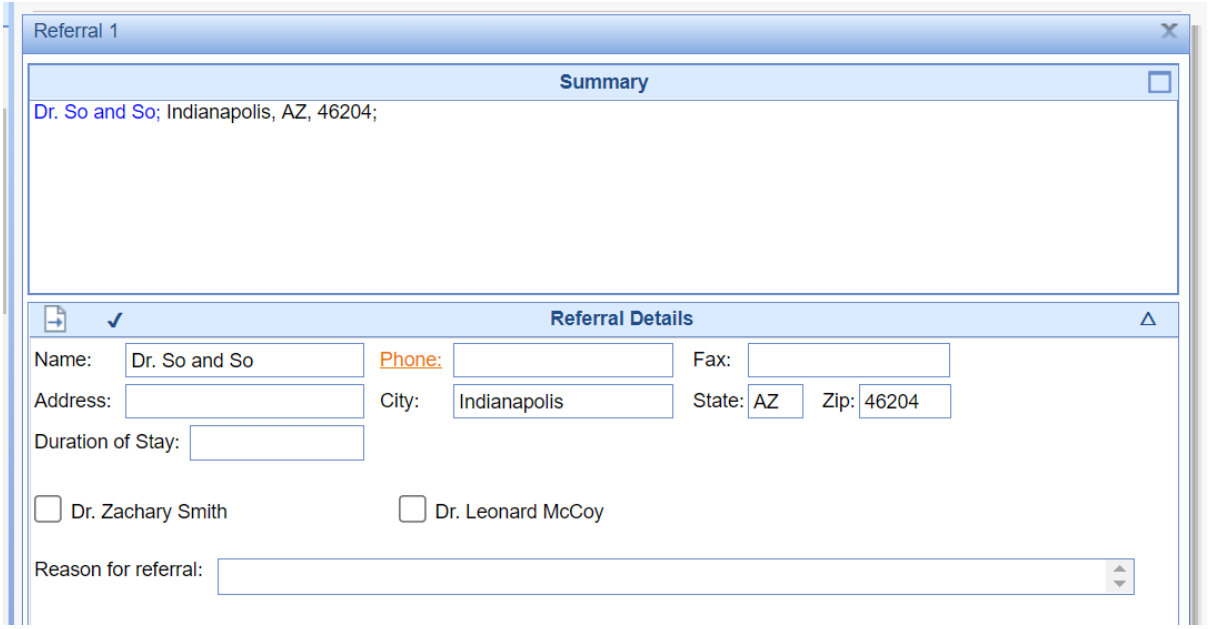
Depending on your practice's workflow, the Order Fulfillment template may be completed in the My Task Orders section by the processor as opposed to the individual who placed the order in Order Entry. This article will describe how to add and edit the details of order fulfillment on an open order.

Steps to Complete

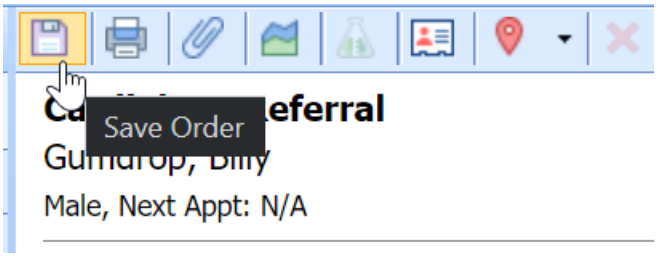
1. Navigate to **My Task Orders**
2. Select an Order
3. If in the order you see the following, **select Add** to pull up the fulfillment template. If there is no option to add details, then there is no order fulfillment template tied to the selected order item.



4. Once the template is displayed add/edit the details and select **Close.**



5. Select **Save**



Setting Appointment with Service Facility in Order Appointment Screen

For order types that include Radiology or Other order types, we have updated the Orders Appointment screen to work in conjunction with Locations in the setup screen based on those order types. The purpose of this update is to allow practices to input, track, and print the Radiology or Other order types via the Appointment and Order Fulfillment screens (as outlined below).

Enhancement Impact:

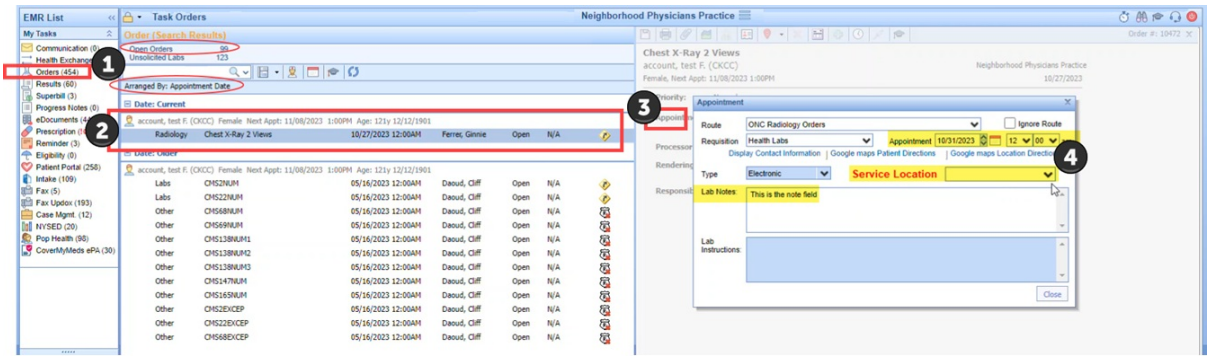
Practice Setup

For practices using this new functionality, the following items would need to be configured for the practice to begin using this feature:

1. Go to Setup > Locations > Add any Radiology Service Facility locations you want to have show in your Orders > Radiology Service Location drop down list (make sure to set the Facility Type = Radiology for it to

show in Order Types set to Radiology. Otherwise use Facility Type = Other for all other order types.

2. Turn on the new company setting to “Add service facility field to Order Appointment” (this is what turns on that Service Facility field in orders
3. Make a plan set old template fields to Read Only once you are ready for your staff to stop using those fields

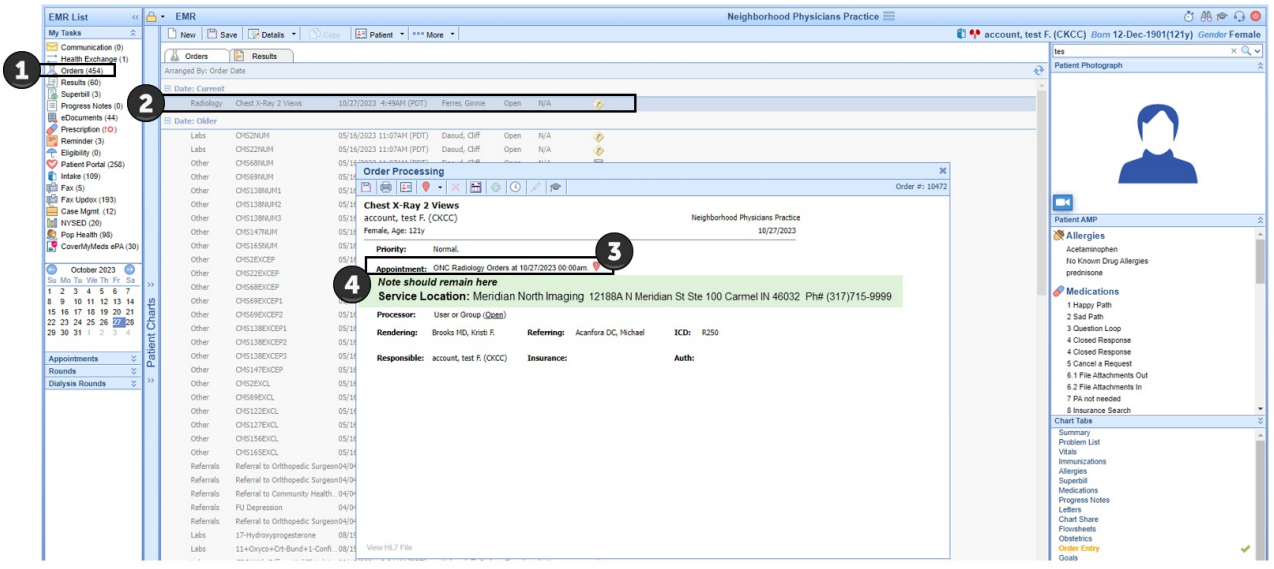


Practice Use

With your Service Facility List in place and your Company Setting updated to Turn on Service Facility in your Order Appointment screen, you can now update your workflow to improve the quality of Order data for utilizing the Appointment Date filter to work your PreCerts:

1. Access your MyTask > Orders and filter your Open Orders (I presume by Order Date to access new requests for processing)
2. Select the Order to process (pre-cert)
3. Clicking on the Appointment Date (which defaults to the Order Date) will open the Appointment window
4. In the Appointment window you will update the date/time to reflect the Scheduled Appointment and set the Service Facility, then add any notes

The display of this entered data would be like shown in the mock-up below (except the font display would be uniform with current font):



When using the existing filter to display by Appointment Date the user will now be able to see the PreCert data needed without the need for the template data that is currently being used/displayed. The new version of the existing connect report UOI Radiology Orders, titled “UOI Radiology Orders 2024” has been created to capture the data entry for these new order components – adding in the fields ‘OrderScreen Location’ and ‘OrderScreen Location Full’ which provide details on location where the appointment will take place.

New PDF Print Quick Picks for the *new* Service Facility Field tied to Order Appointments:

The following new Quick Picks were created to capture the new data fields related to this Radiology and Other order Appointment with Service Facility process. You can access those quick picks Setup > EMR Setup - PDF Print Layout > Select Existing / Create New Requisition layout and then utilize the following quick pick items, as needed:

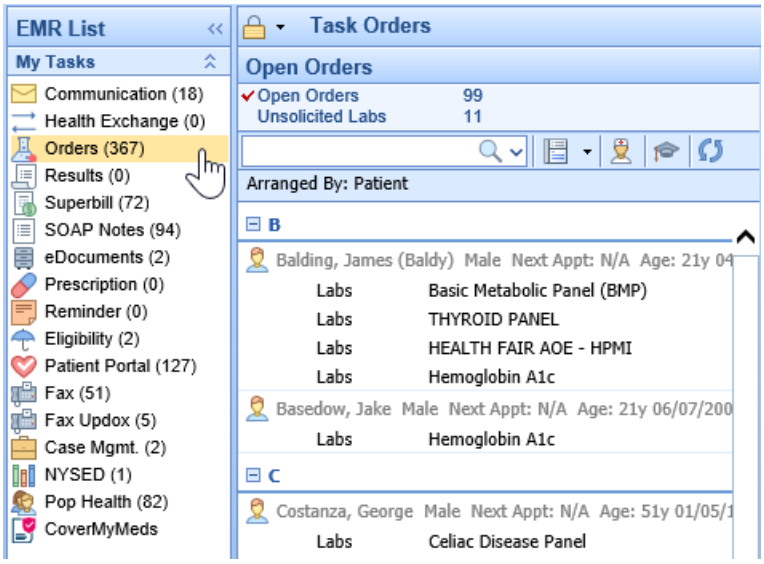
- New quickpick added to dynamic area selections under the "Order Route (order going to)" category for #order_facility.name#
- New quickpick added to dynamic area selections under the "Order Route (order going to)" category for #order_facility.address1#
- New quickpick added to dynamic area selections under the "Order Route (order going to)" category for #order_facility.address2#
- New quickpick added to dynamic area selections under the "Order Route (order going to)" category for #order_facility.primary_contact_phone#
- New quickpick added to dynamic area selections under the "Order Route (order going to)" category for #order_facility.primary_contact_fax#

Change the Processor on an order via My Task - Orders

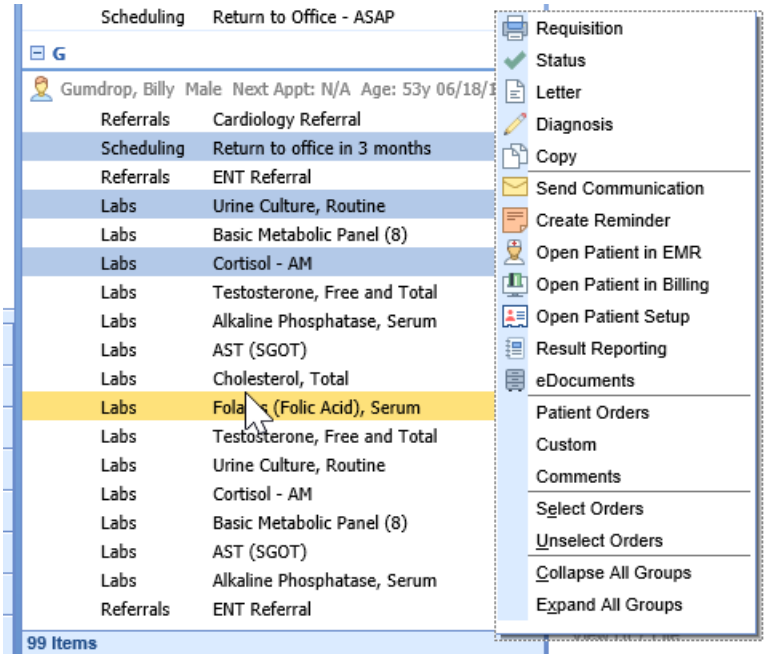
To change an order's processor you can complete this while placing the order, in the Order Entry - History, or My Task - Orders. This article explains the steps to complete this in the Order Entry - History chart tab. There are two ways to complete this task within Order Entry - History.

Steps to Complete (Right Click Menu)

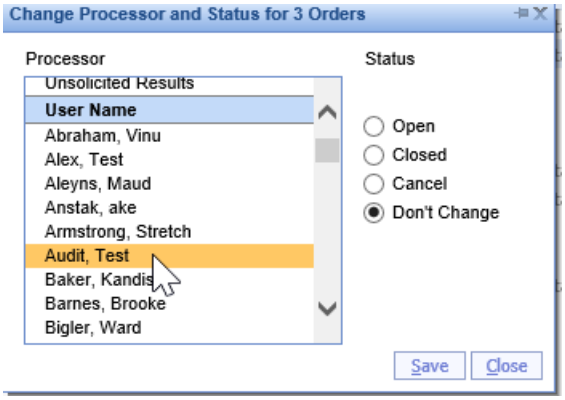
1. Navigate to the **Open Orders** within the My Task - Orders.



2. From the list, you can either select and **right-click** over a single order or select multiple orders at once by using SHIFT+Click and/or CTRL+Click.
3. **Right-click** over the selected order(s), **Select Status**



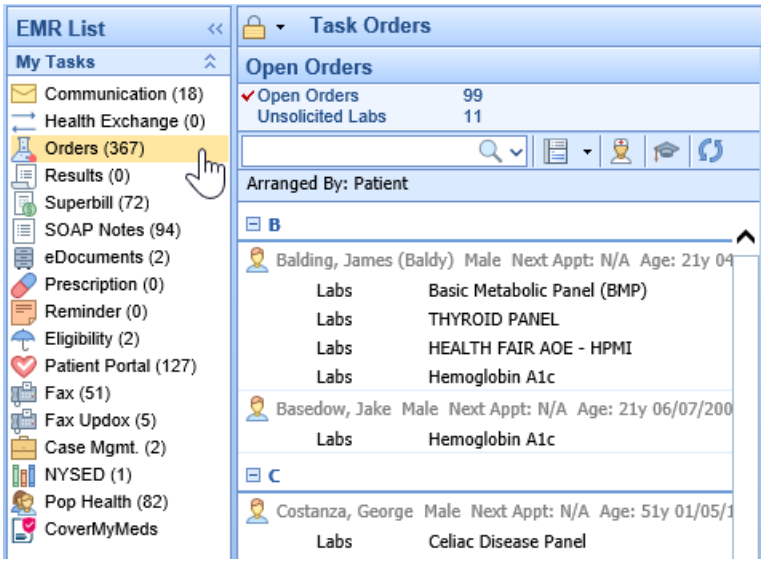
4. From here, use the select list to change the **Processor.** You may also change the status of the selected order(s) from this screen.



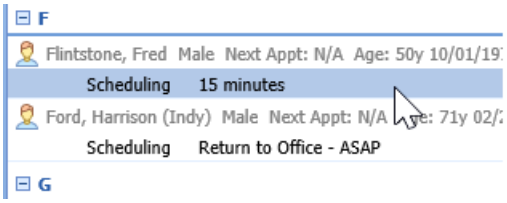
5. **Save**

Steps to Complete (Processing Window)

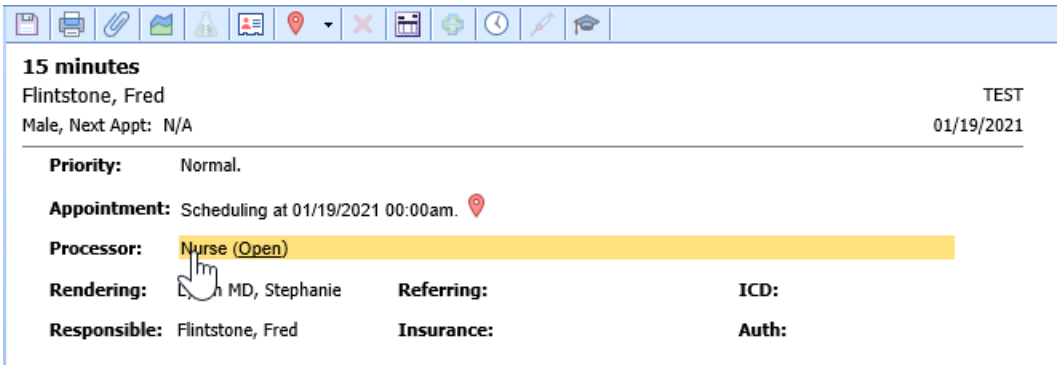
1. Navigate to the **Open Orders** within the My Task - Orders.



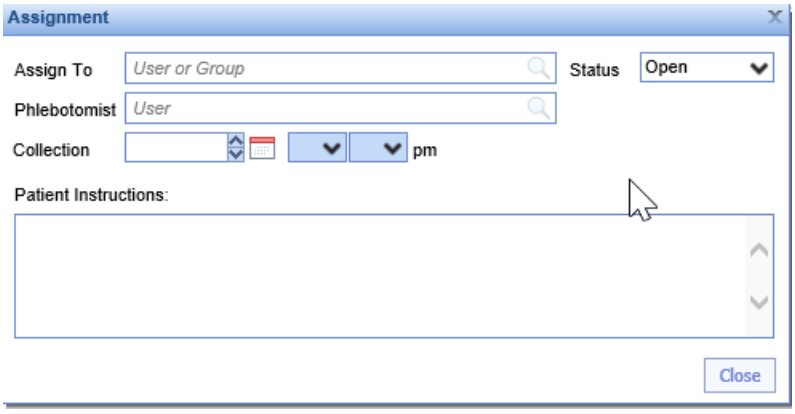
2. From here, locate and **select the order.**



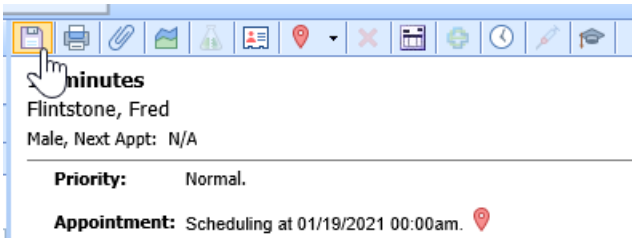
3. Within the processing window, select **Processor**



4. This will open a separate window where the processor can be changed via a **Search Field**



5. **Save**

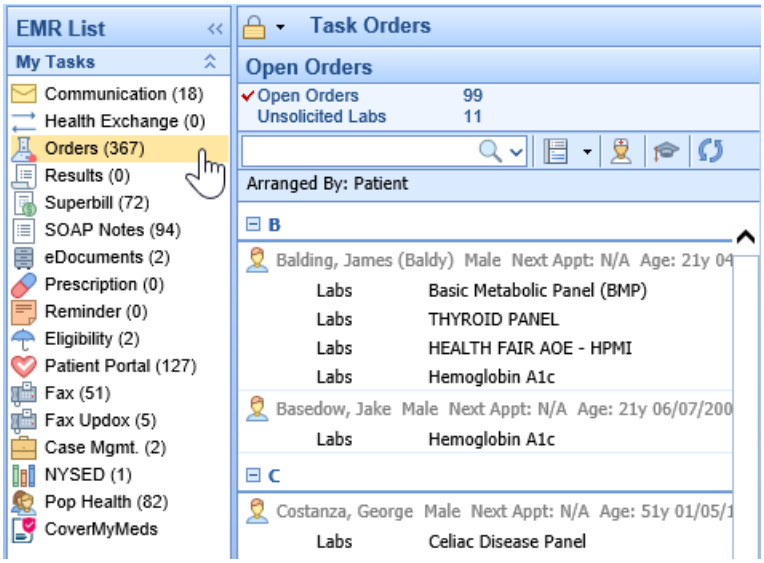


Change the Status of an Order via My Task - Orders

The order status is used to determine the visibility of the order in the My Task - Orders, Open Orders list. There are three options for order status: Open, Closed, Cancelled. This article will describe the two ways to change the status of an order item within My Task - Orders.

Steps to Complete (Right Click Menu)

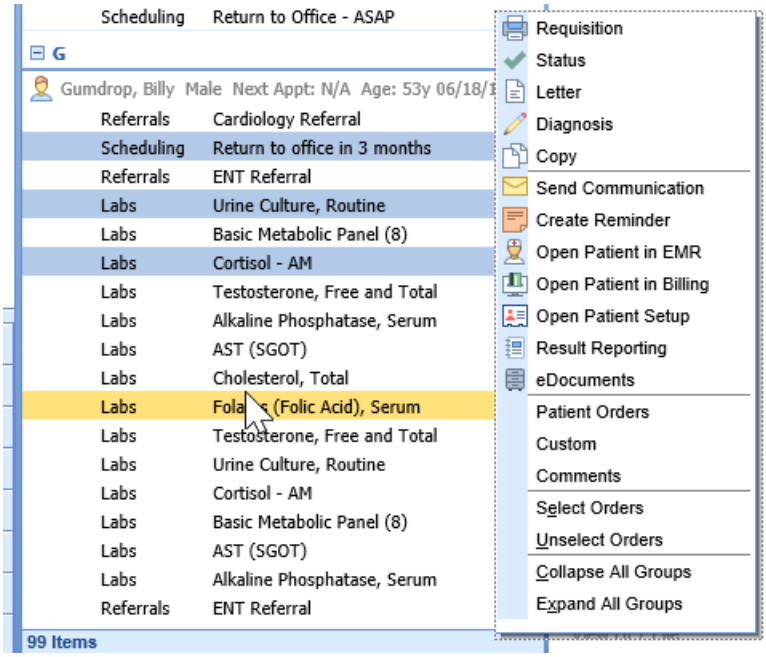
1. Navigate to the **Open Orders** within the My Task - Orders.



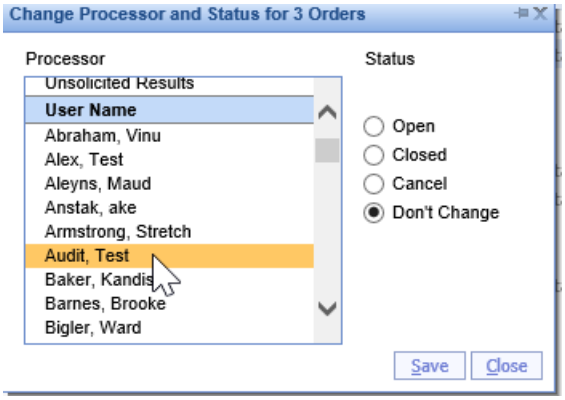
2. From the list, you can either select and **right-click** over a single order or select multiple orders at once by

using SHIFT+Click and/or CTRL+Click.

3. **Right-click** over the selected order(s), **Select Status**



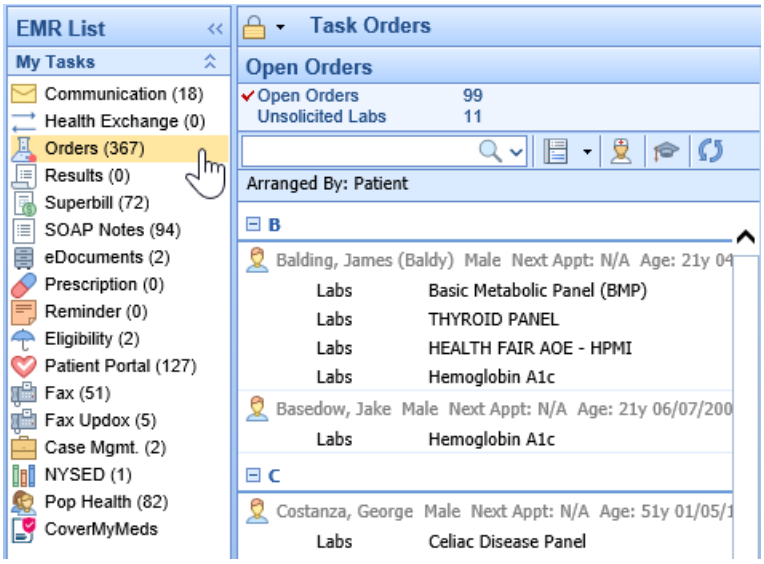
4. From here, use the radio buttons to change the **Status** to Open, Closed, or Cancel.



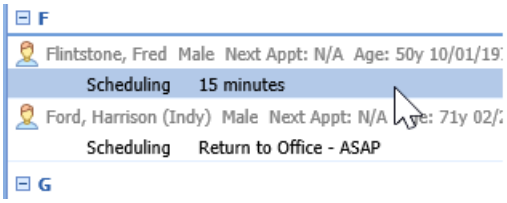
5. **Save**

Steps to Complete (Processing Window)

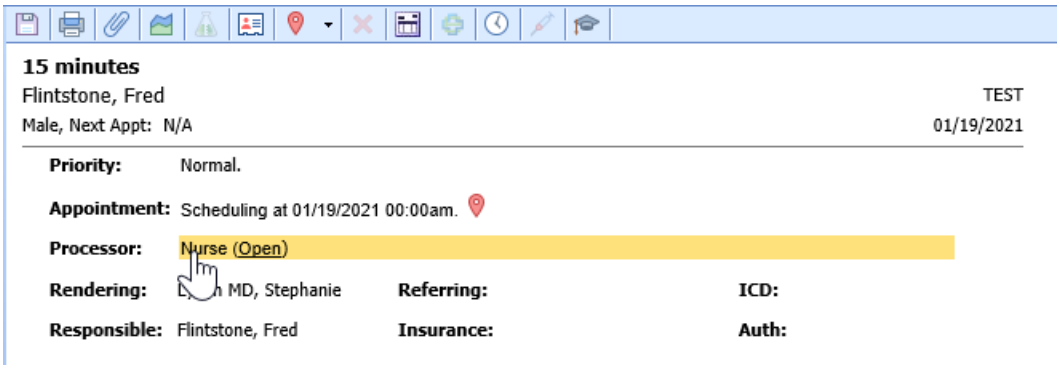
1. Navigate to the **Open Orders** within the My Task - Orders.



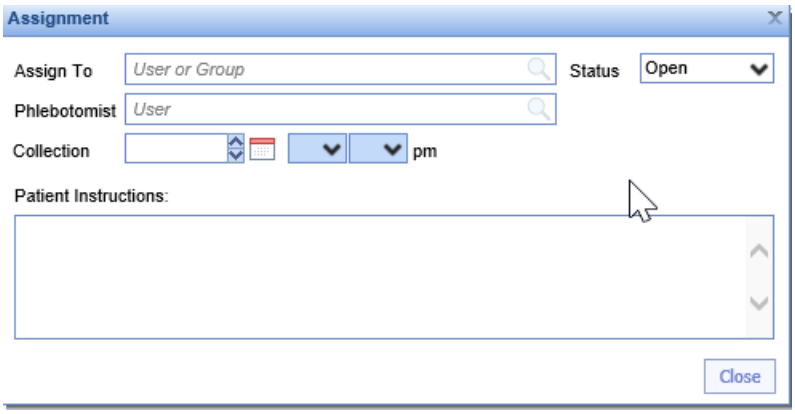
2. From here, locate and **select the order.**



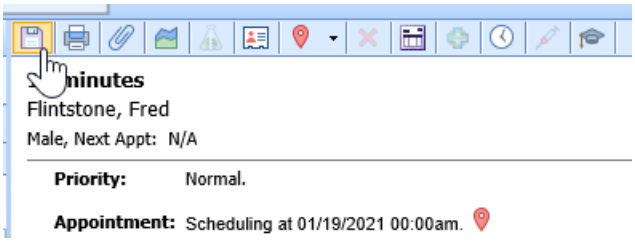
3. Within the processing window, select **Processor**



4. This will open a separate window where the **Status** can be changed via the available dropdown.



5. **Save**


minutes
Flintstone, Fred
Male, Next Appt: N/A
Priority: Normal.
Appointment: Scheduling at 01/19/2021 00:00am.