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.

Open Orders	
 Open Orders Unsolicited Labs 	99 11
	्र 🗄 - 💆 🎓 🚺
Arranged By: Processor	

Steps to Complete

1. Navigate to My Tasks - Orders

My	Tasks	\$
\geq	Communication (18)	
≓	Health Exchange (0)	
A	Orders (367)	
	Results (0)	
6	Superbill (72)	
:=	SOAP Notes (94)	
	eDocuments (2)	
0	Prescription (0)	
=	Reminder (0)	
Ŧ	Eligibility (1)	
\heartsuit	Patient Portal (127)	
Ű,	Fax (51)	
Ű,	Fax Updox (5)	
-	Case Mgmt. (2)	
	NYSED (1)	
	Pop Health (81)	
	CoverMyMeds	

2. Select Open Orders

Open Orders	
 Open Orders Unsolicited Labs 	99 11
	्र 🗄 - 💆 🎓 🚺
Arranged By: Processor	

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

Open	Ord	ers
✓ Open Unsoli		
		् 🖌 🗄 🔸
Arrange	d Rv	Order Rv
E Case		Patient
🗄 Dao		Priority
🗄 Hea		Туре
🗉 Kak		Order
🗆 Lait		Order Date
🙎 ON		Order By
		Appointment Date
👤 Tes		Processor 💌

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

Open Orders						
 Open Orders Unsolicited Labs 	99 11					
	् 🗸 📄 🔹 💆	e ()				
Arranged By: Processor						
🗉 Head, Chandler						
Nurse						
Office Staff						
🙎 Couchpotato, Jackson M	Male Next Appt: N/A Age:	43y 09/15/1977				
Scheduling Retu	urn to office ASAP	01/14/2021	9:38PM (EDT)	Stevens, Heather	Open	- Ø
🙎 Ford, Harrison (Indy) M	lale Next Appt: N/A Age: 7	71y 02/25/1950				
Scheduling Retu	urn to Office - ASAP	02/25/2021	10:43PM (EDT)	Cassady, Wes	Open	

Select Multiple Orders

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

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 <u>select multiple</u> <u>orders</u> at once by using <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>. **Select Requisition** (More Info On Selecting

Orders)

Date: Three We	eks ado								
Labs	CBC (INCLUDES DIFF/PLT	T)	08/11/2021	3:49PM (EDT)	Head, Chandler	Open	Head, Cha	Ì
Date: Last Mon	th								
Labs	Cholesterol, Total		07/30/2021	1:21PM (EDT)	.)	Unfried, Ashley	Open	Nurse	Ò
Labs	CBC w Diff w Plt	-				Unfried, Ashley	Open	eLabs	Ò
Labs	Comp. Metabolic Panel	5	Requisition		l.	Infried Ashlev	Onen	eLabs	Ò
Labs	PSA, Total		Status	Prin	nt r	equisitions for select	ted orders	Office Staff	Ì
Scheduling	Return to office in 2 we	È	Letter			Unfried, Ashley	Open	Office Staff	Ì
Referrals	Cardiology Referral	1	Diagnosis	_	b	Unfried, Ashley	Closed	Nurse	Ì
Date: Older	ſ	3	Сору						
Labs	T3 Uptake					Head, Chandler	Open	Office Staff	Ì
Labs	Thyroxine (T4) Free, Di	🌮 Ba	Processing	_		Head, Chandler	Open	Office Staff	Ò

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.

ер	rint Requisitions (3)		
	✓ Referrals referral	Test, Chandler D. (
	 Cardiology Referral 		
	🗹 Labs (CPT) LabCorp - OLD2	Test, Chandler D. (
	 CBC w Diff w Plt 		
	✓ Quest - STL Quest Diagnostics	Test, Chandler D. (1 🧞
	 Comp. Metabolic Panel 		
rrc	ors (1)		
	Missing Service Location	Test, Chandler D. (1 👯
	 Cholesterol, Total 		

 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.

Open Orders	
 ✓ Open Orders Unsolicited Labs 	99 11
	्र 🗄 • 💆 🎓 🚺
Arranged By: Patient	
в	A
🙎 Balding, James (Baldy	y) Male Next Appt: N/A Age: 21y 04
Labs B	asic Metabolic Panel (BMP)

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.

2 9 =						
Order # Requistion	Reviewed	Max Rows 25				
Order Name	Туре	Electronic				
Order Date	Reviewed Date	То				
Route		Status				
*DME -Home (DMERC) A1106 Lakeland Medical Center A1517 Lee Memorial Hospital A2243 Michiana Hematology A2255 St Joseph Regional Medical Center A2443 Pamida Pharmacy						
A2611 Van Buren / Cass District Hea Created By	Processor	Reviewed By				
Abraham, Vinu Armstrong, Anthony Auer, Kevin Cardio, Charles Cassady, Wesley Cavanaugh, Greg Charest, Michael David, Cleveland Dinn, Phil Distler, Chad Doran, Michael Erickson, David	Group Name 'Unassigned Completed Communications eLabs Greenfield Laboratory Greenfield Pathology Greenfield Radiology Greenfield Scheduler Nurse Office Staff Technician User Name	 Cassady, Wesley Dinn, Phil Erickson, David Hall, Michael Head, Blake Hynes, MD, Patrick Kaiser, Adam Mcdonald, Jason Morales, Caron Norris, Drew Pepper, Dre Poland, Kim 				
Friedly, Kevin	Administrator, Local	Test, Alex				

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.

Max Rows	25

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.

	1 🔬 💻 💡 🖌 🗙	🗄 🤤 🕚 💉 🎓						
Cardiology Re Gumdrop, Billy Male, Next Appt: N/								
Priority:	Normal.							
Appointment:	Referral at 02/02/2021 00:0	Referral at 02/02/2021 00:00am. 🦁						
Processor:	Nurse (<u>Open</u>)							
Rendering:	Cohen M.D., Sandra	Referring:	ICD: I249					
Responsible:	Gumdrop, Billy	Insurance:	Auth:					
Referral 1: Add	1 7> ~[m							

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

Referral 1						X		
	Summary							
Dr. So and	So; Indianapolis, AZ, 46204	1;						
			Referral Detai	ls		Δ		
Name:	Dr. So and So	Phone:		Fax:				
Address:		City:	Indianapolis	State:	AZ Zip: 46204			
Duration o	f Stay:							
Dr. Za	chary Smith		r. Leonard McCoy					
Reason fo	r referral:							

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:

 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

MR List «	🕒 • Task Orders Neighborhood Physicians Practice 🗮								👌 🤼 🎓 🖓 🔕				
/ Tasks 🔗	Order (Search Results)										Order #: 10472 🗙		
Communication (0)	Open Orders Unsolicited Labs	99 123						Chest X-Ra					
Orders (454)	Q - E - B - B - Ø				account, test F. (CKCC) Neighborhood Physicians Practice Female, Next Appt: 11/08/2023 1:00PM 10/27/2023								
Results (60)	Arranged By: Appointment Date					Female, Next A	opt: 11/08/20.	23 1:00PM		10/27/2023			
Superbill (3)	Date: Current							Priority:	Appointmen	at		X	
Progress Notes (0) eDocuments (44		formed as if an international					_	3					
Prescription (1 2	Radiology	(CKCC) Female Next Appt: 11/08/2 Chest X-Ray 2 Views	123 1:00PM Age: 121y 12/12/1901 10/27/2023 12:00AM	Ferrer, Ginnie	Open	N/A	-		Route	ONC Radiology Orders		V Ignore Route	
Reminder (3)	Kadiology	Chest X-Kay 2 Views	10/27/2023 12:00AM	Perrer, Ginnie	Open	N/A	9	Processor	Requisition			10/31/2023 12 00 0	
Eligibility (0)	🗈 Date: Older					Display Contact Information Google maps Patient Directions Google maps Location Direction							
Patient Portal (258)	2 account, test F. (CKCC) Female Next Appt: 11/08/2023 1:00PM Age: 121y 12/12/1901					Rendering	Туре	Electronic V	Service Locatio				
Intake (109) Fax (5)	Labs	CMS2NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	1	Responsib			Derrice Locatio		
Fax Updox (193)	Labs	CMS22NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	1	Responsie	Lab Notes:	This is the note field		Light a	
Case Mgmt. (12)	Other	CMS68NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8						
NYSED (20)	Other	CMS69NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	3					*	
Pop Health (98)	Other	CMS138NUM1	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8		Lab				
CoverMyMeds ePA (30)	Other	CMS138NUM2	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	3		Instructions	r			
	Other	CMS138NUM3	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8						
	Other	CMS147NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8					· · · · · · · · · · · · · · · · · · ·	
	Other	CMS165NUM	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	3					Close	
	Other	CMS2EXCEP	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8						
	Other	CMS22EXCEP	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	3						
	Other	CMS68EXCEP	05/16/2023 12:00AM	Daoud, Cliff	Open	N/A	8						

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:

- 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.



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

Assignment				X
Assign To	User or Group	Status	Open	~
Phlebotomist	User 🔍			
Collection	😂 📰 🗸 🗸 pm			
Patient Instruc	tions:		AF	
			.0	~
				Ť
				Close

5. Save

ر ^{Im} ninutes								
Flintstone, Fred								
Male, Next Appt: N/A								
Priority:	Normal.							
Appointment: Scheduling at 01/19/2021 00:00am. 🤗								

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 <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>.

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

	Scheduling	Return to Office - ASAP		Requisition		
🖻 G			-	Status		
🙎 Gun	ndrop, Billy Ma	ale Next Appt: N/A Age: 53y 06/18/1	P	Letter		
	Referrals Cardiology Referral		0	Diagnosis		
	Scheduling Return to office in 3 month		r A	Сору		
	Referrals ENT Referral			Send Communication		
	Labs Urine Culture, Routine					
	Labs Basic Metabolic Panel (8)		E.	Create Reminder		
	Labs	Cortisol - AM	7	Open Patient in EMR		
	Labs	Testosterone, Free and Total	Ē	Open Patient in Billing		
	Labs	Alkaline Phosphatase, Serum	1	Open Patient Setup		
	Labs	AST (SGOT)	1	Result Reporting		
	Labs	Cholesterol, Total		eDocuments		
	Labs	Fola (Folic Acid), Serum		Patient Orders		
	Labs	Testosterone, Free and Total		Custom		
	Labs	Urine Culture, Routine		Comments		
	Labs	Cortisol - AM Basic Metabolic Panel (8) AST (SGOT) Alkaline Phosphatase, Serum				
	Labs			Select Orders		
	Labs			Unselect Orders		
	Labs			Collapse All Groups		
	Referrals	ENT Referral		Expand All Groups		
99 Items	8					

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

	1 🔬 🛤 🧕 🖌 🗙	1	1					
15 minutes Flintstone, Fred Male, Next Appt: M					TEST 01/19/2021			
Priority:	Normal.							
Appointment:	Appointment: Scheduling at 01/19/2021 00:00am. 🤗							
Processor:	Nurse (Open)							
Rendering:	MD, Stephanie	Referring:		ICD:				
Responsible:	Flintstone, Fred	Insurance:		Auth:				

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

Assignment					X
Assign To	User or Group	Q	Status	Open	~
Phlebotomist	User	_ Q,			
Collection	🗘 📰 🔍 💙 pm				
Patient Instru	ctions:				
				0	~
					\sim
					Close

5. Save

