

Prescription Refill Task List

Last Modified on 09/02/2025 12:05 pm EDT

Overview of My Tasks - Prescriptions - Refills

The Refills section within the My Tasks Prescription portal is used to manage electronic refill requests sent to your practice by either your patient (via MyMedicalLocker) or by the pharmacy (via the SureScripts network).

Pharmacy Refill Requests

As a practice, you will be able to determine if you receive refill requests from the pharmacy or not. This setting must be configured by a member of our support team. Please contact support to have this setup: [How to Contact Support](#).

Once enabled, refill requests initiated by the pharmacy will flow into the Refill queue. Your team will be able to review, triage, and approve, replace, or deny the request.

Patient Refill Requests

Additionally, you may find it beneficial to allow your patients to request refills of medications as well via MyMedicalLocker (aka Patient Portal). To enable this feature, simply activate this setting: [Company Setting: Prescription Settings and Rules - MyMedicalLocker - MyMedicalLocker Prescription Refills](#)

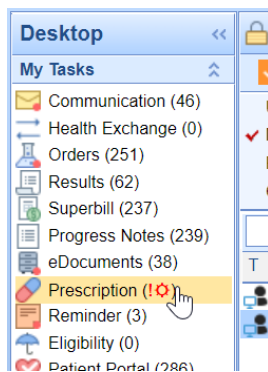
The screenshot displays the 'Prescription Tasks' interface. On the left, a sidebar lists various task categories: My Tasks, Communication (46), Health Exchange (0), Orders (251), Results (62), Superbill (237), Progress Notes (239), eDocuments (38), Prescription (10), Reminder (3), Eligibility (0), Patient Portal (286), Fax (0), Fax Upload (0), Case Mgmt. (2), NYSED (20), Pop Health (96), and CoverMyMeds. The main panel is titled 'Prescription Tasks' and shows a summary of refill requests: Refills (10) and Changes (1). Below this, a table lists the status of requests: Unsolicited Refill Requests (0), My Assigned Refill Requests (2), Pending Refill Requests (8), and Completed Refill Requests (13). A table below this shows a list of requests with columns: T, Requested, First, Last, Provider, Assignee, and Pharmacy. The first row shows a request from 11/01/2021 for Zachary Delaplane, assigned to Brooks MD, Kristi F., with the pharmacy RxRefills. The right panel shows a detailed view of a specific refill request. It indicates the refill has been in the queue for 44 hours and is awaiting a response. The patient is Zachary Delaplane, born 12/01/2010, male. The prescriber is Kristi F. Brooks MD. The medication is Ambien CR 6.25 mg tablet, extended release, Schedule IV drug. The prescription ID is 5781, strength is 6.25 mg, sig is 'Use as directed every 6 hours', original quantity is 100, dispense is 'Each', DAW is 'No', and the refill quantity is 'NR'. The request was written on 10/19/2021. At the bottom, there is an 'Office Memo' field and a 'Response' section with buttons for 'Approve', 'Replace', and 'Deny'.

Configure Refill Queues (Assignment Setup)

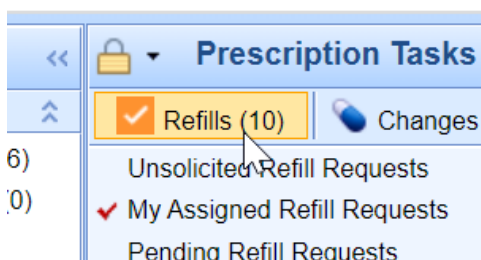
The Refills section within the My Tasks Prescription portal is used to manage electronic refill requests sent to your practice by either your patient (via MyMedicalLocker) or by the pharmacy (via the Surescripts network). Each user in the practice will be able to determine what refill requests show in his/her task lists to ensure they only see the appropriate change requests to accommodate his/her workflow. These settings can be modified by following the below steps:

Steps to Configure Assignment Setup

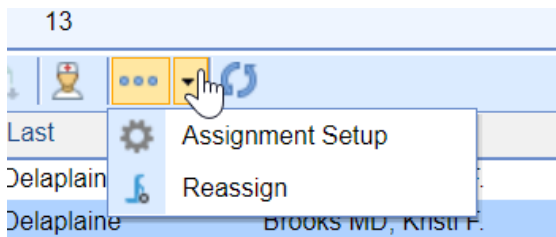
1. Navigate to **My Tasks > Prescriptions**.



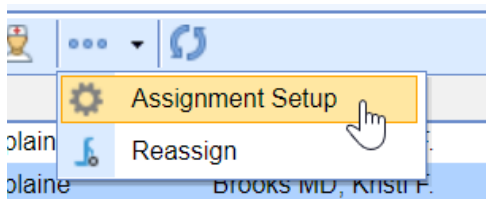
2. Open the **Refills** tab.



3. Click the **More** dropdown.



4. Select **Assignment Setup**.



5. **Modify the settings** to meet your needs/workflow.

Assignment Setup for Prescription Refills

1. My Tasks Counts

☐ None

☒ Unsolicited

☒ My Assigned

☐ Pending

2. Default Prescribers

<input checked="" type="checkbox"/>	6802462799001	Aitkens, Eric M. Aitkens	Yes
<input type="checkbox"/>	6133079882003	Andrew, Jones S. Andrew	Yes
<input checked="" type="checkbox"/>	6169298034001	Barber, Diana Barber	Yes
<input checked="" type="checkbox"/>	0000047875177	Bates, Anna Bates	Yes
<input checked="" type="checkbox"/>	2538962223001	Bender, Erin L. Bender	Yes
<input checked="" type="checkbox"/>	6366253329001	Bertoli, Vincent Bertoli	Yes
<input type="checkbox"/>	6266109423003	Boop, Betty E. Boop	Yes
<input checked="" type="checkbox"/>	0000077875177	Branson, Thomas M. Branson	Yes
<input type="checkbox"/>	6028776873011	Brooks, Kristi F. Brooks	Yes
<input checked="" type="checkbox"/>	6028776873003	Brooks, Kristi F. Brooks	Yes
<input checked="" type="checkbox"/>	6028776873004	Brooks, Kristi F. Brooks	Yes

3. Update Additional Users

1. Select how you would like your My Tasks counts totaled.

2. Select which Prescribers you would like to see by default within the Pending or Completed (Last 7 days) lists.

3. Enter Additional user(s) that **YOU** use, separated by a comma, that you would like these changes applied too.

Last changed on September 2, 2021 9:24AM (MDT)

Save

Cancel

6. Click the **Save** button.

that you would like these changes applied too.

Last changed on September 2, 2021 9:24AM (MDT)

Save

Cancel

Save

Assignment Setup Details

The following options can be modified in the Assignment Setup window:

My Task Counts

The My Task Counts section allows a user to determine how the My Task > Prescriptions counts are tallied.

- **None** - Regardless of refills assigned to you, no numbers will display in the My Tasks > Prescription queue. This would be appropriate for a user that does not use the refill task list.
- **Unsolicited** - This will tally up refills in the Unsolicited Refill Requests queue. This would be appropriate for a user that is assigned to triage refill requests that can not be automatically assigned to a patient.
- **My Assigned** - This will tally up refills in the My Assigned Refills queue. This would be appropriate for a user that reviews and approves refill requests that get assigned directly to them or a user group (e.g. RxRefills for MML Refill Requests) they are in.

- **Pending** - This will tally up refill requests in the Pending Refill Requests queue based on requests assigned to prescriber that they are or work for/on behalf of. This would be appropriate for a user that triages/assigns requests for prescribers or a practice that does not assign refill requests to specific users/user groups, rather they are/work on behalf of specific prescribers.

Default Prescribers

This is the list of providers that are set up with Surescripts to electronically send prescriptions and receive refill requests. By selecting a prescriber location from this list, you will see refill requests assigned to these prescriber locations within the Pending Refill Requests list that have not been assigned to a specific user/user group. It also configures which prescriber locations to display requests for in the Completed Refill Requests queue.

Update Additional Users

Once you have configured a queue for a user, it may be appropriate to configure others in the practice to have the same settings. To do this, supply a list of User ID's for users that need these same settings as you. Separate each user name with a comma.

Manage the Prescription Refills Task Queues

Users have a variety of options when managing the refill tasks queues. These various queues allow for distinct activities to take place in order to efficiently manage the workflow related to these requests. This article will discuss each queue in detail.

Refill Validation Update (2025)

Purpose

In response to a single report of a patient mismatch in a refill, additional validations were added to have the database ensure that refill in question matches the prescription's patient. In the event of a mismatch between the received request and outbound response, then an error occurs and the user will be unable to continue without resetting their screen, and then the user can attempt the refill again.

Unsolicited Refill Requests

Purpose

Unsolicited refill requests are requests that have been received but are not yet assigned to be approved or denied. A request will end up in this queue in the event that the request can not be automatically associated with a patient and/or a provider.

Guidance

It is recommended that practices designate one-to-many users to manage the Unsolicited list. This user or group of users would be responsible to associate a valid patient to the request. The user will also be responsible for assigning the request to a specific user to approve.

Configuration

To configure a user to have access to the Unsolicited queue, add the user to the 'RxRefills' User Group.

My Assigned Refill Requests

Purpose

The My Assigned refill requests are requests that have been specifically assigned to your user with the expectation that you will review and manage these requests. Managing a request may mean adding information, assigning the request to other users, approving, replacing, or denying the request

Guidance

It is recommended that users actively monitor and manage items in the My Assigned queue on a daily basis.

Configuration

Be sure that your user has the 'My Assigned' option selected in the Assignment Setup screen: [Configure Refill Queues \(Assignment Setup\)](#).

Pending Refill Requests

Purpose

The Pending refill requests are requests that are no longer unsolicited and are waiting to be managed by a user or a group of users. The items found in this list are based on the settings applied in the Assignment Setup screen for your user. Managing a request may mean adding information, assigning the request to other users, approving, replacing, or denying the request

Guidance

It is recommended that users actively monitor and manage items in the Pending queue on a daily basis. Items managed from this list are typically not assigned to your user directly but are associated with a provider that you may work with or on behalf of. F

Configuration

Be sure that your user has the 'Pending' option selected in the Assignment Setup screen: [Configure Refill Queues \(Assignment Setup\)](#). Also, be sure you have selected the correct providers that you work with or on behalf of in the Assignment Setup screen.

Completed Refill Requests

Purpose

The Completed refill requests are requests that have been approved, replaced, or denied in the last 7 days. The list will display completed requests assigned to you or ones associated with a provider that you work with or on behalf of.

Configuration

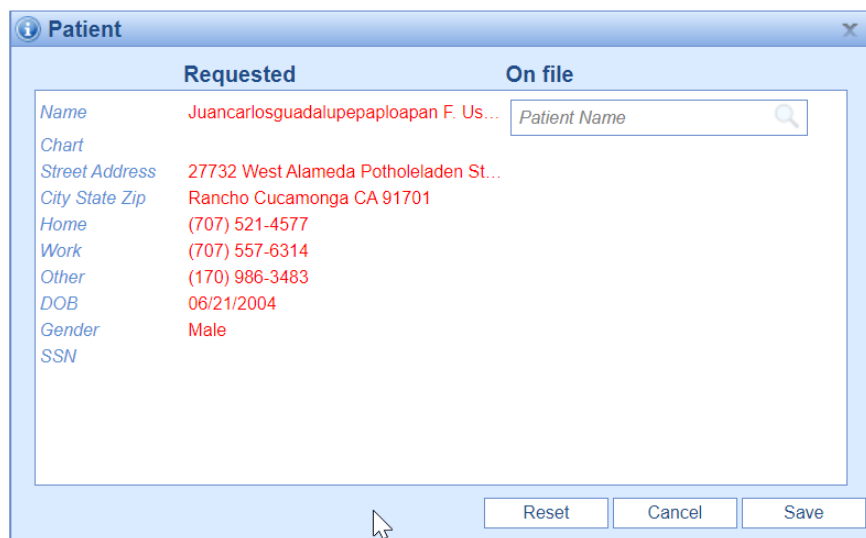
Be sure you have selected the correct providers that you work with or on behalf of in the Assignment Setup screen: [Configure Refill Queues \(Assignment Setup\)](#).

Link an unsolicited refill request to a patient

For users that manage the Unsolicited Refill queue, one of the key responsibilities is linking a refill request that was received by the pharmacy to the correct patient in your application. Most of the time, this connection will happen automatically if the correct data points are supplied by the pharmacy that initiated the request. In the event that a patient can not be auto-linked to the refill request, you will need to perform that action. Follow the steps below:

Steps to link a patient to an unsolicited refill request

1. After selecting the refill request from the list on the left, you will see a prompt asking you to associate the refill to a patient. The patient details provided by the pharmacy will show on the left.



The screenshot shows a 'Patient' dialog box with a title bar containing an information icon and a close button. The dialog is divided into two main sections: 'Requested' and 'On file'. The 'Requested' section contains a list of patient details: Name (Juancarlosguadalupepaploapan F. Us...), Chart, Street Address (27732 West Alameda Potholeladen St...), City State Zip (Rancho Cucamonga CA 91701), Home ((707) 521-4577), Work ((707) 557-6314), Other ((170) 986-3483), DOB (06/21/2004), Gender (Male), and SSN. The 'On file' section contains a search box labeled 'Patient Name' with a magnifying glass icon. At the bottom of the dialog are three buttons: 'Reset', 'Cancel', and 'Save'.

2. Use the **search box** to find the patient you wish to link the request to. Select the patient from the list.

Patient

Requested	On file
Name	Juancarlosguadalupepaploapan F. Us...
Chart	test
Street Address	27732 West Alameda Potholeladen St...
City State Zip	Rancho Cucamonga CA 91701
Home	(707) 521-4577
Work	(707) 557-6314
Other	(170) 986-3483
DOB	06/21/2004
Gender	Male
SSN	222113333

10 of 427 results

Reset Cancel Save

- The system will compare the demographics provided by the pharmacy to the demographics on file in the application. Differences will be shown in red for your convenience.

Patient

Requested	On file
Name	Juancarlosguadalupepaploapan F. Us...
Chart	test
Street Address	27732 West Alameda Potholeladen St...
City State Zip	Rancho Cucamonga CA 91701
Home	(707) 521-4577
Work	(707) 557-6314
Other	(170) 986-3483
DOB	06/21/2004
Gender	Male
SSN	222113333

Reset Cancel Save

- Click **Save** to associate the refill to the selected patient.

Reset Cancel **Save**

Save

Change the owner of a prescription refill request

For users that manage the Prescription Refill task list at any level, you may find it necessary to change the owner of a refill request. You may do this because you need more information from a colleague, or you may just be assigning an unsolicited refill request to its rightful owner. No matter the reason, use the steps below to change the owner of a refill request.

Please note, making this change will put the request into the 'My Assigned' queue for the user you send it to.

Steps to change or remove the owner of a refill request

1. After selecting the refill request from the list on the left, you will see all the details of the request.

Neighborhood Physicians Practice

Refill requested on November 1, 2021 10:46AM (MDT)

This refill has been in the queue for 51 hours. Awaiting Response

Prescribed

Patient: Zachary Delaplaine Born 12/01/2010 Gender Male

Prescriber: Kristi F. Brooks MD

Medication: Ambien CR 6.25 mg tablet, extended release Schedule IV drug

Dispensed

Patient: Zachary Delaplaine Born 12/01/2010 Gender Male

Prescriber: Kristi F. Brooks MD

Medication: Ambien CR 6.25 mg tablet, extended release Schedule IV drug

Prescription ID: 5781

Strength: 6.25 mg

Sig: Use as directed every 6 hours

Original Qty: 100

Dispense: Each

DAW: No

Refill Quantity: NR

Written: 10/19/2021

Office Memo

Response

Approve Replace Deny

2. To change the owner, **put your cursor in the search box and begin typing** the name of the user you want to assign the request to. Once found, **select the user's name**. Please note, to remove all owners from the request, click the X to clear out the owner.

Neighborhood Physicians Practice

Refill requested on November

cha

This refill has been in the queue for 51 hours. Awaiting Response

Prescribed

Patient: Zachary Delaplaine Born 12/01/2010 Gender Male

Prescriber: Kristi F. Brooks MD

Medication: Ambien CR 6.25 mg tablet, extended release Schedule IV drug

Dispensed

Patient: Zachary Delaplaine Born 12/01/2010 Gender Male

Prescriber: Kristi F. Brooks MD

Medication: Ambien CR 6.25 mg tablet, extended release Schedule IV drug

Prescription ID: 5781

Strength: 6.25 mg

Sig: Use as directed every 6 hours

Original Qty: 100

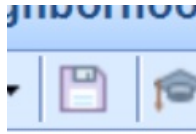
7 results

Name	Username	First Name	Last Name	Role
Bilyj, Michael	mbilyj	N	User	
Do Not Us, do not use	changeme	N	User	
Gregson, Michael	mgregson	Y	User	
Hall, Michael	mhall	Y	User	
Head, Chandler	!chandler	Y	User	
Head, Chandler	chead			
Long, MD, Michael C.	mlong			

User ID: !chandler

New

3. Click **Save**



Success!

This request will now be available in that user's My Assigned queue.

Respond to a prescription refill request - Approve/Replace/Deny/Reassign

For users that have the ability to respond to a prescription refill request, you will need to take action on the requests that are assigned to you. Taking action means completing one of the following for each request: approve the request, deny the request, replace the request, or reassign the request.

- **Approve the Request:** Take this action when you want the refill request to go through exactly as it has been requested from the pharmacy. The only change you can make is the number of dispensing that is approved.
 - Please note, you **may not** be able to approve a request under the following conditions:
 - If the medication is a controlled substance. Controlled substances can only be denied or replaced.
 - If the request is missing required information.
- **Replace the Request:** Take this action when you want to change anything about the original request other than the refill count. This could include changing the dosage, instructions, or the medication entirely.
- **Deny the Request:** Take this action when you do not want the request to be approved in any way. This may be because the patient is no longer in your care, they stopped taking the medication, or any other reason.
 - Please note, you **may be** required to deny a request under the following conditions:
 - if the medication is not a codified medication (i.e. a compound medication).
- **Reassign the Request:** If you don't feel that you have enough information to respond to the request, you may find it beneficial to type in an "office memo", then [change the owner on the request](#) so that another user can gather the information and then re-assign it to you.

Steps to Approve

1. After selecting the refill request from the list on the left, you will see all the details of the request.
2. Click **Approve**

3. Verify the number of dispensing you would like to allow. You can optionally decide to add an approval comment for your records.

Refill Approval

Dispense as: **BD 3mL syringe 25G x 1**

Save as: **BD 3mL syringe 25G x 1**

Total number of Approved refills:

4. Click **Approve**.

Approve Refill Req

Success!

This request will now be moved to the 'Completed Refills' queue.

Steps to Replace

1. After selecting the refill request from the list on the left, you will see all the details of the request.
2. Click **Replace**.

Click here to replace refill

3. Supply a replacement comment (as you see fit).

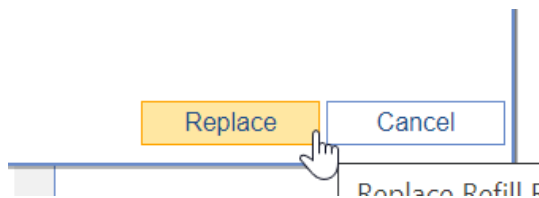
Refill Replacement

Dispense as: **BD 3mL syringe 25G x 1**

Save as: **BD 3mL syringe 25G x 1**

Replacement Comment

4. Click **Replace**.



5. The prescription pad will open. **Use this to modify the prescription in any way you see fit.**

Prescription Refill for Zachary Delaplaine - 311994

Refill History Favorites Options RxHub History PDMP Patient BSA 1

Drug Search Drug Edit My Favorite My Therapeutic Classes Other Favorites

Drug and Dosage for Admin Favorites

- aspirin 81 mg tablet, delayed release [Disp: 30.00 Tablet Sig: 1 pp Refill: NR]
- Asprin Ec Low Dose 81 mg tablet, delayed release
- atomoxetine 10 mg capsule
- benazepril 5 mg tablet
- Coufarin 10 mg tablet
- Coufarin 10 mg tablet [Sig: test]
- Coumadin 10 mg tablet [Disp: Tablet]
- Coumadin 5 mg tablet
- Lipitor 10 mg tablet
- Lipitor 80 mg tablet [Disp: Tablet Sig: 2 puffs ac Alerts: Test alert]
- Lipitor 80 mg tablet [Disp: Tablet Sig: 18 ac Alerts: Test alert]
- Protonix 40 mg tablet, delayed release
- Protonix 40 mg tablet, delayed release [Sig: ac Alerts: alert]
- Test N'Go Blood Glucose System [Disp: Each Sig: Testing 1]

Rx Refill Brooks MD, Kristi F.
5599 Miller Parkway Louisville, KY 41035
Phone: (414) 231-2233 DEA: BB4334847

Prescribe

Patient:	Delaplaine, Zachary 12/01/2010(10.11y) Male 51.00in 62lbs as of 10/06/2021 901 Sauvblanc Blvd Petaluma, CA 94952 Phone (555) 555-5555	Written:	11/03/2021
Drug:	Protonix 40 mg tablet, delayed release	Diagnosis:	
Sig:	Use as directed every 6 hours		
Dispense:	100 Each		
Refills:	One	Effective:	
Note:	alert	Void:	
		Dispense as Written:	No
Pharmacy:	Shollenberger Pharmacy (707) 984-5571 2002 S McDowell Boulevard Ext, Petaluma, CA 94954		
More+	Send Prescription Information	<input checked="" type="checkbox"/> Benefit Check	Save Print Send

6. Click **Send** on the Rx Pad.

Success!

This request will now be replaced and moved to the 'Completed Refills' queue.

Steps to Deny

1. After selecting the refill request from the list on the left, you will see all the details of the request.
2. Click **Deny**.

Approve Replace Deny



3. Supply a denial reason and a denial comment (as you see fit).

Refill Denial

Total number of Denied refills: 0

Denial Reason Code

Medication denied at patient request

Medication has been discontinued

Medication never prescribed for the patient

Patient had allergy to requested medication

Patient has requested refill too soon

Patient needs appointment

Patient never under Prescriber/Pharmacy Care

Patient no longer under Prescriber/Pharmacy Care

Patient should contact Prescriber first

Patient unknown to the Prescriber/Pharmacy

Prescriber not associated with this practice or location.

Refill not appropriate

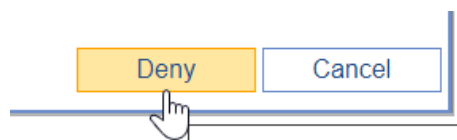
Request already responded to by other means (e.g. phone or fax)

Denial Comment

OfficeEMR cannot electronically transmit non-codified drugs

Deny Cancel

4. Click **Deny**.



Success!

This request will now be denied and moved to the 'Completed Refills' queue.

Delete a Prescription Refill Request

Prescription Refill Requests sent by pharmacies should be replied to within 24-48 hours of receipt. All prescription refills should be responded to with at least a denial when possible. In the event that a refill request is outdated, follows these steps to delete the refill request:

1. Access the [Prescription Refill Requests Task list](#).
2. Select the **prescription refill request** you wish to delete in either the Unsolicited or Pending Refill Requests queue.

The screenshot shows the 'Prescription Tasks' interface. On the left is the 'EMR List' sidebar with categories like My Tasks, Communication (1), Health Exchange (0), Orders (2), Superbill (29), Progress Notes (2), eDocuments (1), Prescription (5), Reminder (0), Eligibility (0), and Patient Portal (287). The main area is titled 'Prescription Tasks' and has tabs for 'Refills (1)' and 'Changes (4)'. Under 'Refills (1)', there are counts: Unsolicited Refill Requests (0), My Assigned Refill Requests (0), Pending Refill Requests (1), and Completed Refill Requests (19). Below this is a table with columns: T, Requested, First, Last, Provider, and Assignee. A single row is visible: 12/07/2021, Zachary, Delaplaine, Bertoli MD, Vincent.

3. Click on the **New** menu.

This screenshot shows the 'New' menu open in the top right corner of the 'Prescription Tasks' interface. The menu options are 'New' and 'Delete'. The 'Delete' option is highlighted. The background shows the same 'Prescription Tasks' interface as the previous screenshot, but with the 'New' menu open. The 'Delete' option is highlighted in red.

4. Select the **Delete** menu option.

The screenshot shows the 'Delete Prescription' dialog box. It contains the following information: Patient: Angelyne Delaplaine Born 09/01/2012 Gender Female; Height: 48lbs (2019-01-01); Pharmacy: Shollenberger Pharmacy; Prescriber: Vincent Bertoli MD; Medication: Vimpat 10 mg/mL oral solution Schedule V drug; Prescription ID: 6418. The 'Delete' button is highlighted in red.

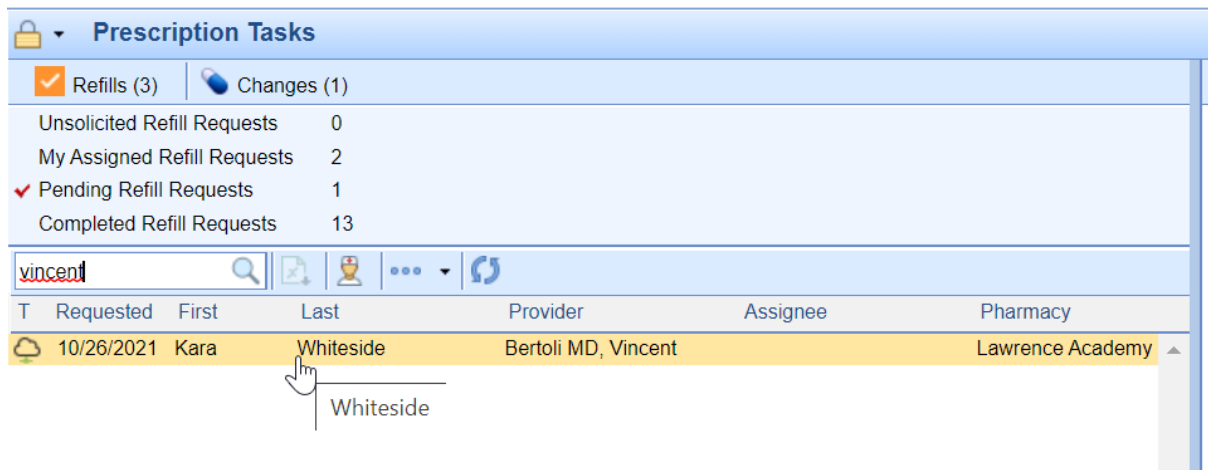
Reassign several refill requests at once

For practices that utilize the Prescription Refill request feature, you may find it necessary to reassign several refill requests from one user to another. This may be because an employee is on vacation and you would like someone

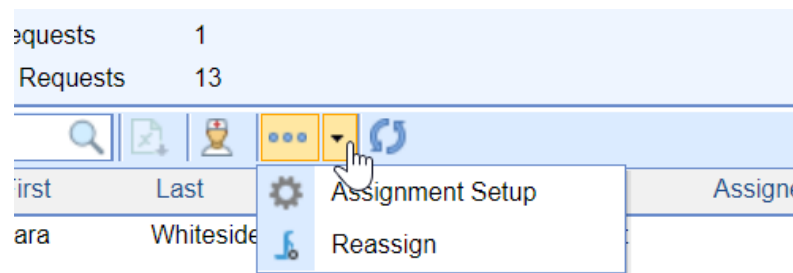
else to manage their tasks, that employee may have been terminated, or you just need to re-distribute the workload. Regardless of the reason, you can use the Reassign function to mass update several requests all at once.

Steps to Reassign Refill Requests

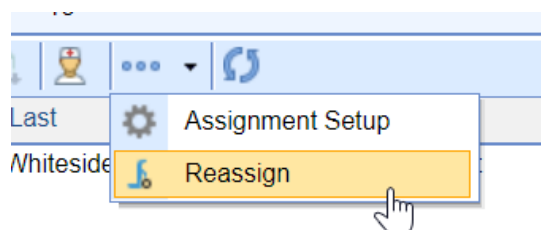
1. While in the Prescription Refill tasks queue, search for the items you would like to reassign. This is done by first selecting the correct queue, then typing in your desired search.



2. Once the list returns, **click the down arrow** on the More menu.



3. Select **Reassign**.



4. On the Task Action window, use the **Assignment** search box to identify the user or user group you would like to assign the requests to. You can optionally add an **Office Memo** to all of the requests that you are reassigning so that the recipient knows why they have been assigned this task. Alternatively, if you are needing to remove the assignment (rather than change to another user), click the **Remove Assignment** button.

Task Action

You have elected to reassign Prescription Refill Requests, use the search box below to set the assignment.

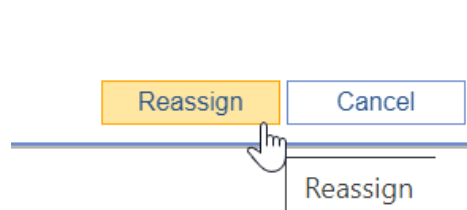
Note: This action will affect 1 record.

Assignment

Office Memo

☐ Remove Assignment

5. Click **Reassign**.



Success!

The requests will now be routed to the user or user group that you assigned them to.