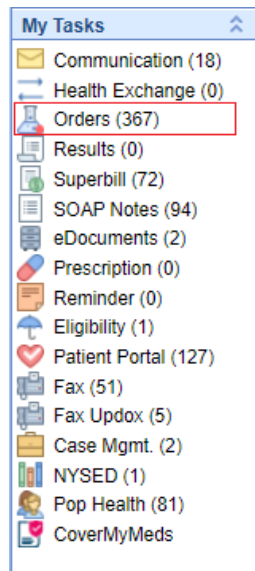


My Task - Orders

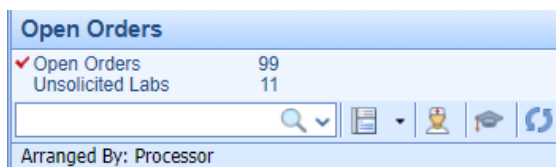
Last Modified on 09/02/2025 1:23 pm EDT

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 based on the needs of each user. From the My Task Orders you can [Add Order Fulfillment Details](#), [Print Requisitions](#), Input Authorization Details, change the status of an order and [Search for Additional Orders](#).



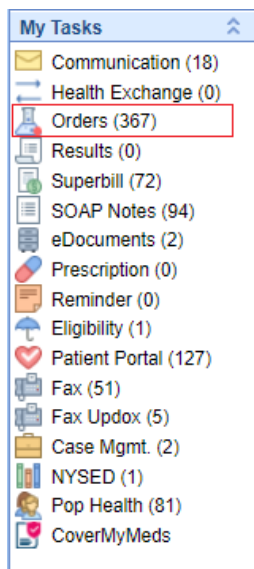
Select an Order in the My Task List

Within the **My Tasks - Orders** they will be listed beneath the "**Open Orders**" heading. The Open Orders count displays Open orders in which your user is the Processor or a part of the Processor Group for that order.

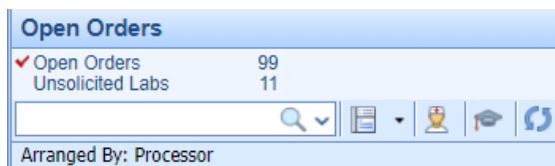


Steps to Complete

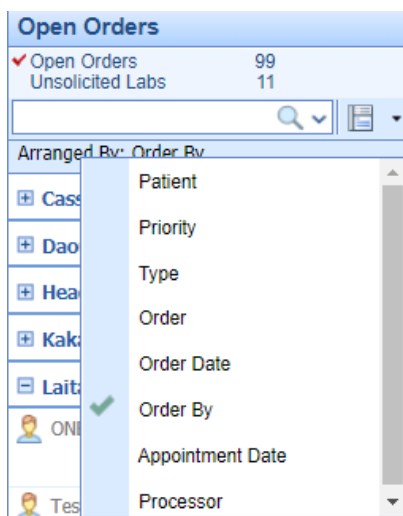
1. Navigate to **My Tasks - Orders**



2. Select **Open Orders**



3. If you have not already done so, **set the Arranged By**. This will group orders for a more efficient workflow, i.e. if you will be processing orders for a particular provider, you can arrange by "Ordered by"



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 | 99 | | | | | |
| Unsolicited Labs | 11 | | | | | |
| <input type="text"/> | | | | | | |
| Arranged By: Processor | | | | | | |
| + eLabs | | | | | | |
| + Head, Chandler | | | | | | |
| + Nurse | | | | | | |
| Office Staff | | | | | | |
| Couchpotato, Jackson Male Next Appt: N/A Age: 43y 09/15/1977 | | | | | | |
| Scheduling | Return to office ASAP | 01/14/2021 9:38PM (EDT) | Stevens, Heather | Open | | |
| Ford, Harrison (Indy) Male Next Appt: N/A Age: 71y 02/25/1950 | | | | | | |
| Scheduling | Return to Office - ASAP | 02/25/2021 10:43PM (EDT) | Cassady, Wes | Open | | |

Select Multiple Orders

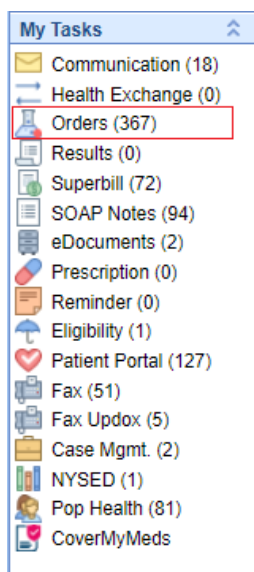
From the list, you can either select and **right-click** over a single order or select multiple orders at once by using SHIFT+Click and/or CTRL+Click.

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)

| Arranged By: Order Date | | | | | | | |
|-------------------------|--------------------------|-------------------------|-----------------|--------|--------------|--|--|
| Date: Three Weeks ago | | | | | | | |
| Labs | CBC (INCLUDES DIFF/PLT) | 08/11/2021 3:49PM (EDT) | Head, Chandler | Open | Head, Cha... | | |
| Date: Last Month | | | | | | | |
| Labs | Cholesterol, Total | 07/30/2021 1:21PM (EDT) | Unfried, Ashley | Open | Nurse | | |
| Labs | CBC w Diff w Plt | | Unfried, Ashley | Open | eLabs | | |
| Labs | Comp. Metabolic Panel | | Unfried, Ashley | Open | eLabs | | |
| Labs | PSA, Total | | | | Office Staff | | |
| Scheduling | Return to office in 2 we | | Unfried, Ashley | Open | Office Staff | | |
| Referrals | Cardiology Referral | | Unfried, Ashley | Closed | Nurse | | |
| Date: Older | | | | | | | |
| Labs | T3 Uptake | | Head, Chandler | Open | Office Staff | | |
| Labs | Thyroxine (T4) Free, D | | Head, Chandler | Open | Office Staff | | |


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.

Create Requisitions



Reprint 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. (...  

- Comp. Metabolic Panel

Errors (1)

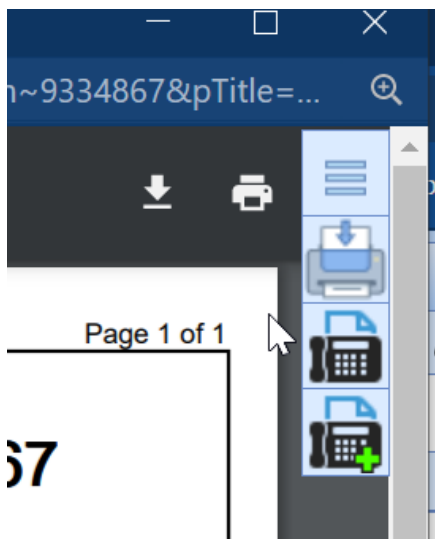
 Missing Service Location Test, Chandler D. (...  

- Cholesterol, Total

OK

Cancel

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.

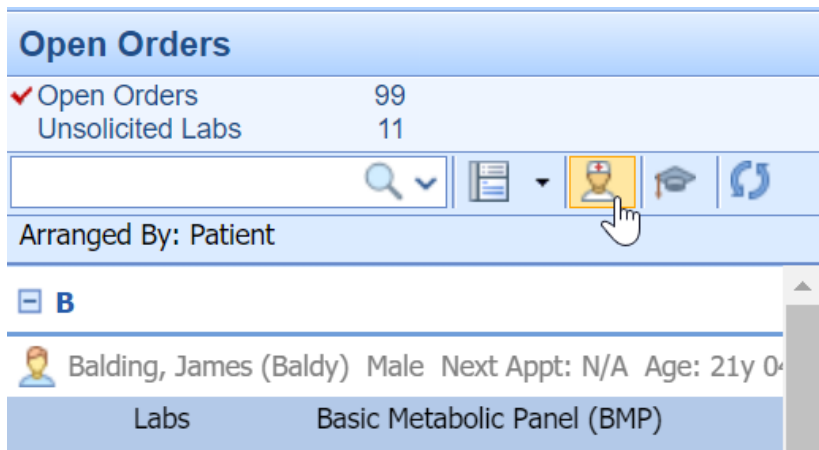


Open Patient in the EMR from My Task Orders

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.

Order # Requisition # Max Rows

Chart # Results Reviewed

Order Name Type Electronic

Order Date To Reviewed Date To

Route Status

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
Friedly, Kevin

Group Name
*Unassigned
Completed Communications
eLabs
Greenfield Laboratory
Greenfield Pathology
Greenfield Radiology
Greenfield Scheduler
Nurse
Office Staff
Technician
User Name
Administrator, Local

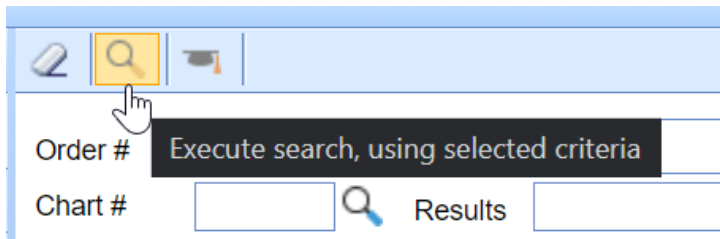
Cassady, Wesley
Dinn, Phil
Erickson, David
Hall, Michael
Head, Blake
Hynes, MD, Patrick
Kaiser, Adam
Mcdonald, Jason
Morales, Caron
Norris, Drew
Pepper, Dre
Poland, Kim
Test, Alex

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

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



Order #

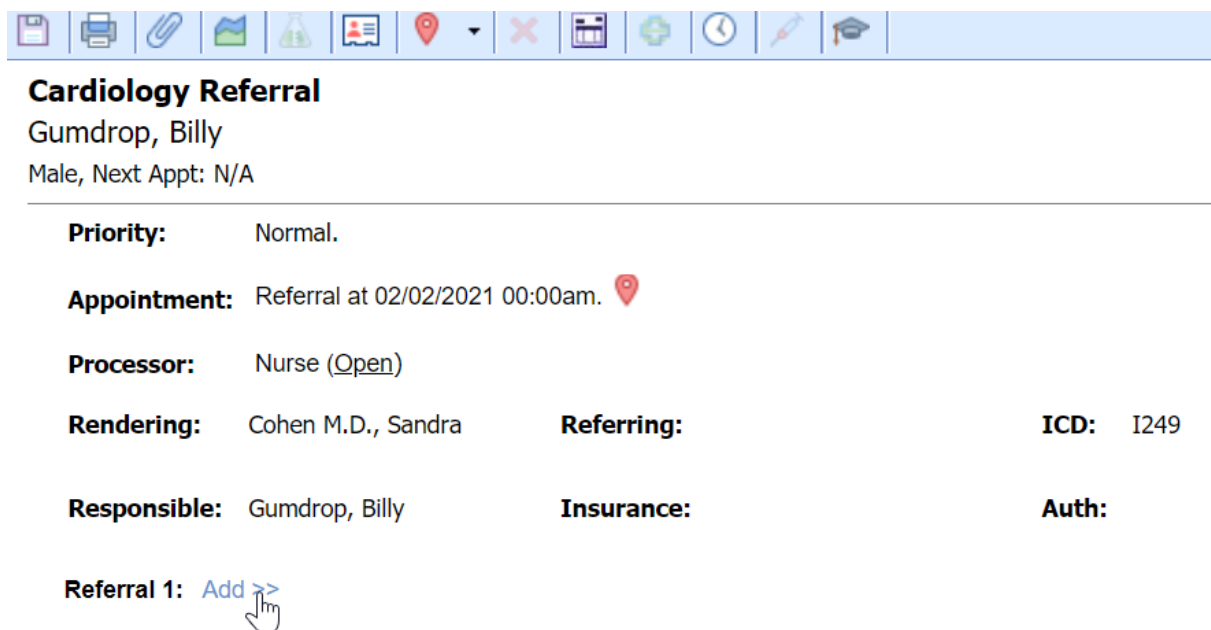
Chart #  Results

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.



Cardiology Referral
Gumdrop, Billy
Male, Next Appt: N/A

| | | | |
|---------------------|---|-------------------|------------------|
| Priority: | Normal. | | |
| Appointment: | Referral at 02/02/2021 00:00am.  | | |
| Processor: | Nurse (Open) | | |
| Rendering: | Cohen M.D., Sandra | Referring: | ICD: I249 |
| Responsible: | Gumdrop, Billy | Insurance: | Auth: |

Referral 1: [Add >>](#) 

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

Referral 1

Summary

Dr. So and So; Indianapolis, AZ, 46204;

Referral Details

Name: Dr. So and So

Phone:

Fax:

Address:

City: Indianapolis

State: AZ









Zip: 46204

Duration of Stay:

☐ Dr. Zachary Smith
 ☐ Dr. Leonard McCoy

Reason for referral:

5. Select **Save**

Save Order

Referral

Gumdrop, Billy

Male, Next Appt: N/A

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.

EMR List

My Tasks

Communication (18)

Health Exchange (0)

Orders (367)

Results (0)

Superbill (72)

SOAP Notes (94)

eDocuments (2)

Prescription (0)

Reminder (0)

Eligibility (2)

Patient Portal (127)

Fax (51)

Fax Updox (5)

Case Mgmt. (2)

NYSED (1)

Pop Health (82)

CoverMyMeds

Task Orders

Open Orders

Open Orders 99

Unsolicited Labs 11

Arranged By: Patient

Balding, James (Baldy) Male Next Appt: N/A Age: 21y 04

Labs Basic Metabolic Panel (BMP)

Labs THYROID PANEL

Labs HEALTH FAIR AOE - HPMI

Labs Hemoglobin A1c

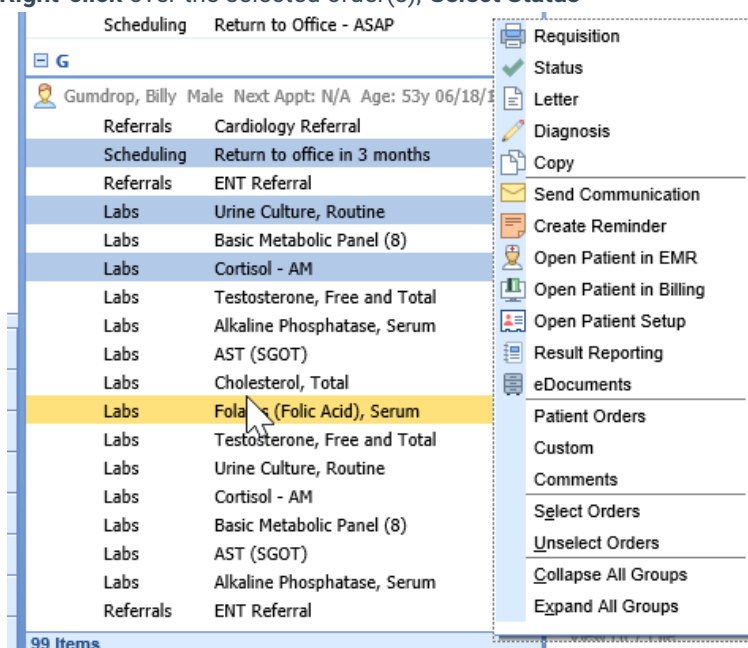
Basedow, Jake Male Next Appt: N/A Age: 21y 06/07/200

Labs Hemoglobin A1c

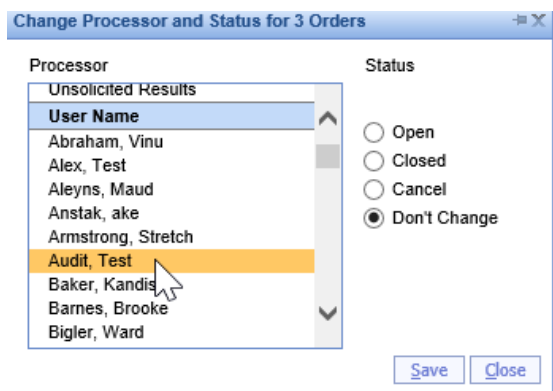
Costanza, George Male Next Appt: N/A Age: 51y 01/05/1

Labs Celiac Disease Panel

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



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



- Save**

Steps to Complete (Processing Window)

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

EMR List << **Task Orders**

My Tasks ^

- Communication (18)
- Health Exchange (0)
- Orders (367)**
- Results (0)
- Superbill (72)
- SOAP Notes (94)
- eDocuments (2)
- Prescription (0)
- Reminder (0)
- Eligibility (2)
- Patient Portal (127)
- Fax (51)
- Fax Updocx (5)
- Case Mgmt. (2)
- NYSED (1)
- Pop Health (82)
- CoverMyMeds

Open Orders

✓ Open Orders 99
Unsolicited Labs 11

Arranged By: Patient

B

Balding, James (Baldy) Male Next Appt: N/A Age: 21y 04

Labs Basic Metabolic Panel (BMP)

Labs THYROID PANEL

Labs HEALTH FAIR AOE - HPMI

Labs Hemoglobin A1c

Basedow, Jake Male Next Appt: N/A Age: 21y 06/07/200

Labs Hemoglobin A1c

C

Costanza, George Male Next Appt: N/A Age: 51y 01/05/1

Labs Celiac Disease Panel

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

F

Flintstone, Fred Male Next Appt: N/A Age: 50y 10/01/19

Scheduling 15 minutes

Ford, Harrison (Indy) Male Next Appt: N/A Age: 71y 02/

Scheduling Return to Office - ASAP

G

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

15 minutes

Flintstone, Fred TEST
Male, Next Appt: N/A 01/19/2021

Priority: Normal.

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 processor can be changed via a **Search Field**

Assignment

Assign To User or Group Status Open

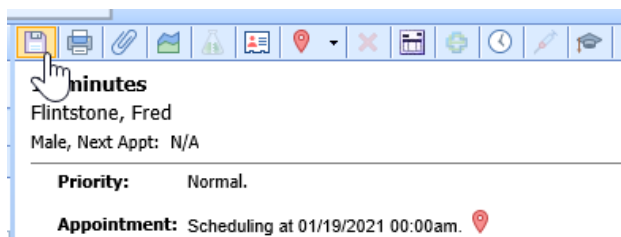
Phlebotomist User

Collection pm

Patient Instructions:

Close

5. **Save**

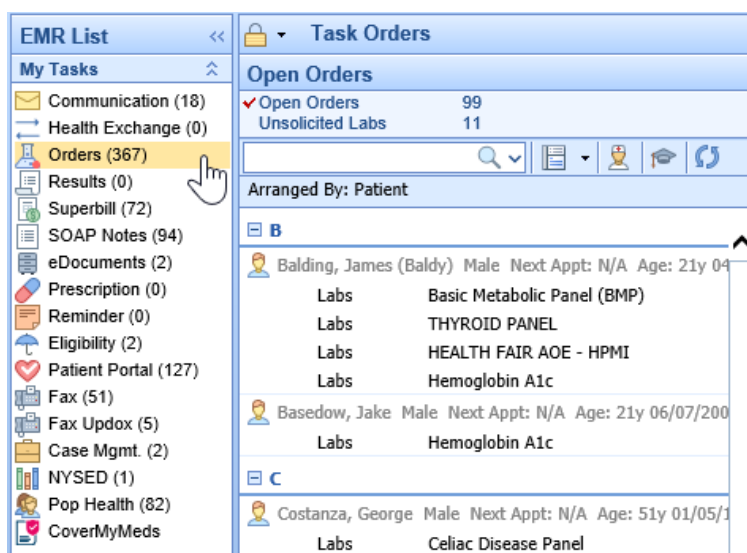


Change the Status of an Order via My Task - Orders

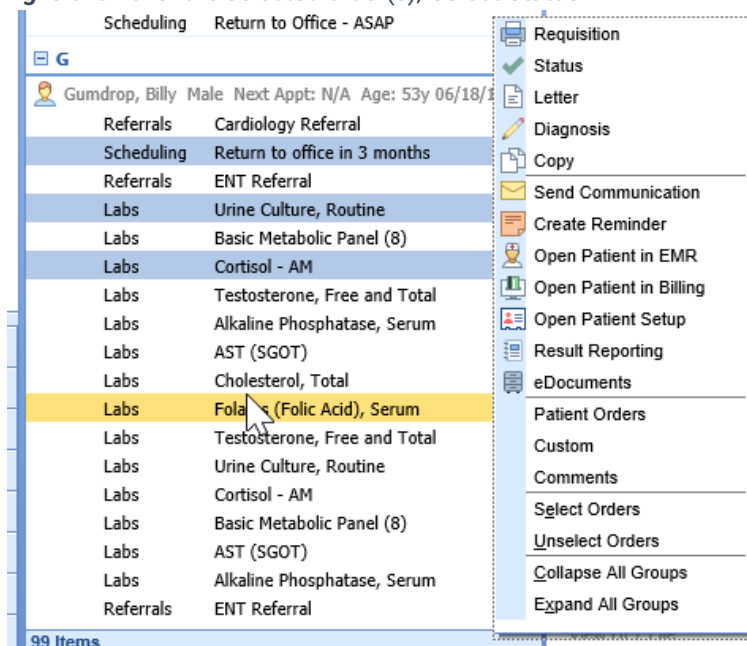
The order status is used to determine the visibility of the order in the My Task - Orders, Open Orders list. There are three options for order status: Open, Closed, Cancelled. This article will describe the two ways to change the status of an order item within My Task - Orders.

Steps to Complete (Right Click Menu)

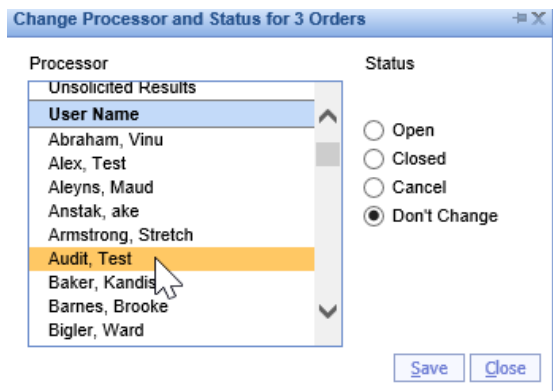
1. Navigate to the **Open Orders** within the My Task - Orders.



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.



Change Processor and Status for 3 Orders

| Processor | Status |
|---------------------|---|
| Unsolicited Results | |
| User Name | |
| Abraham, Vinu | <input type="radio"/> Open |
| Alex, Test | <input type="radio"/> Closed |
| Aleyns, Maud | <input type="radio"/> Cancel |
| Anstak, ake | <input checked="" type="radio"/> Don't Change |
| Armstrong, Stretch | |
| Audit, Test | |
| Baker, Kandis | |
| Barnes, Brooke | |
| Bigler, Ward | |

Save Close

5. **Save**
-