COMMUNICATION AND TASKING

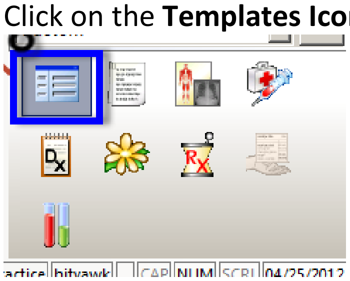
Tasking in NextGen is designed to send a one way message from one user to another. Usually tasks are sent from templates or modules as an automatic response to an action the user performed such as placing an order where a task may need to be sent to the Lab to draw the specimen for the order.

The Communication template is used to document communication had with or about the patient including phone calls, letters and faxes. The documentation from the communication template can be tasked to a user for follow-up with or about the patient. Examples of when the Communication template is to be used are: call in for medication refill requests, fax sent out to the DME company for the patient's DME order, or a letter that is sent to the patient about their test results.

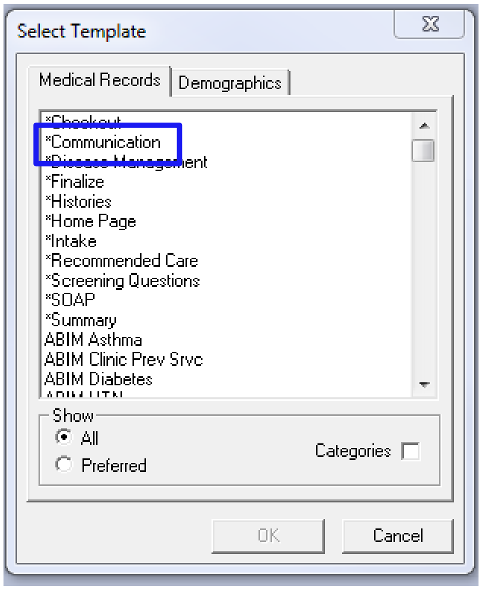
USING THE COMMUNICATION TEMPLATE

1. You must be in a patient's chart.
2. Do your 5 point check (Name, Location, Provider, Encounter, User)
3. You must be in an unlocked encounter, if you are not, you must create one.
4. Click New from the history toolbar. This is only used for NON-office visit or non-billable encounters.

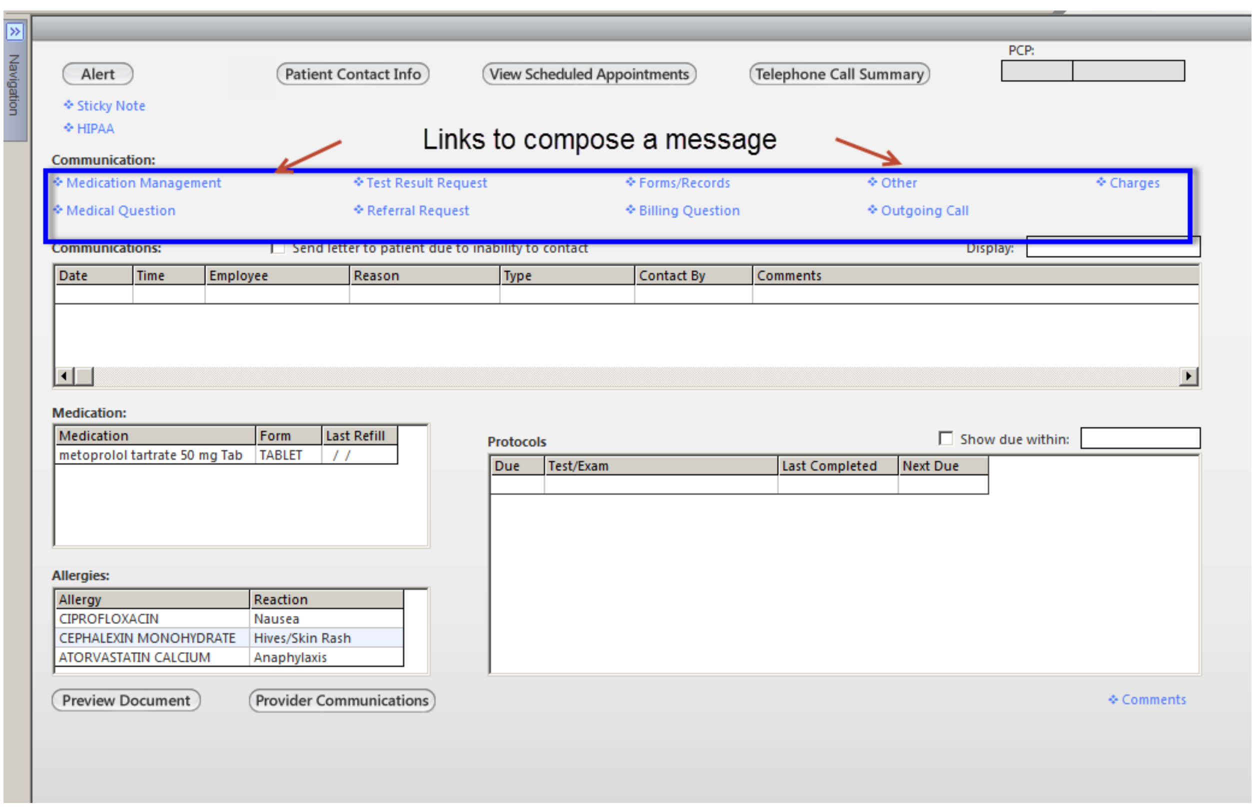
5. Click on the **Templates Icon** in the tic-tac-toe.



6. Select ***Communication** from the list.

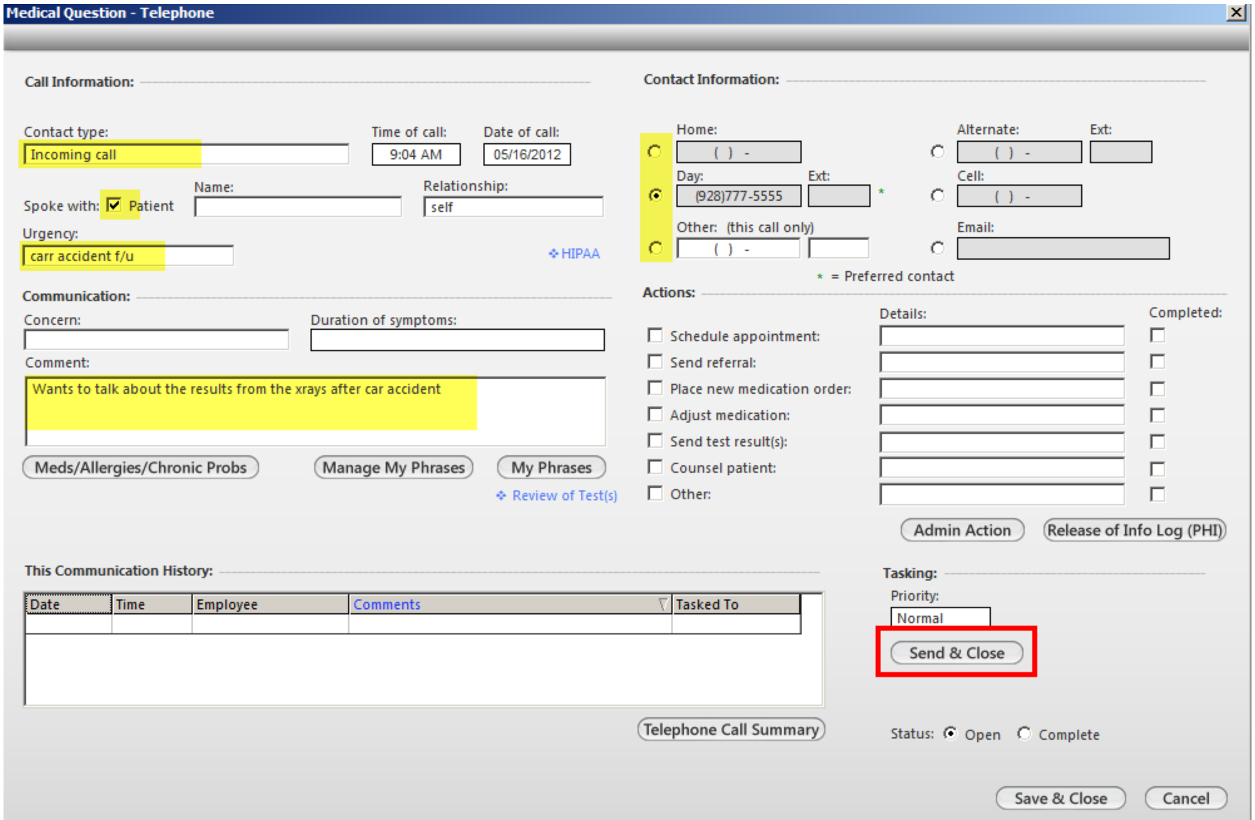


7. Use the button at the top to access Patient Contact Information and Appointments
8. Use the **Telephone Call Summary** button to generate a document and read every message that was ever taken on this patient's chart.
9. To document a new communication, use one of the communication links, which now becomes the subject of your message if you choose to send it as a task.



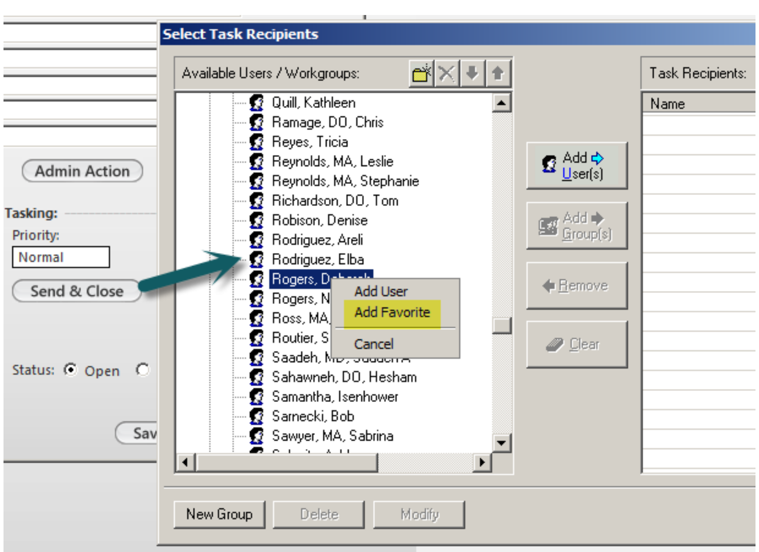
10. When you open a link, fill in the appropriate message or type in the comments box.
11. See below for all advisable fields to fill out for the most complete message.

12. The URGENCY field can be typed in, so if you want a small message to appear in the inbox of the receiver, you can type in that box.
13. When you are ready to send it, click the Send and Close button towards the bottom right.



When you click Send and Close, you will get a task recipient pop-up. From the left side list, you want to find the person or workgroup in which you want this task to go to.

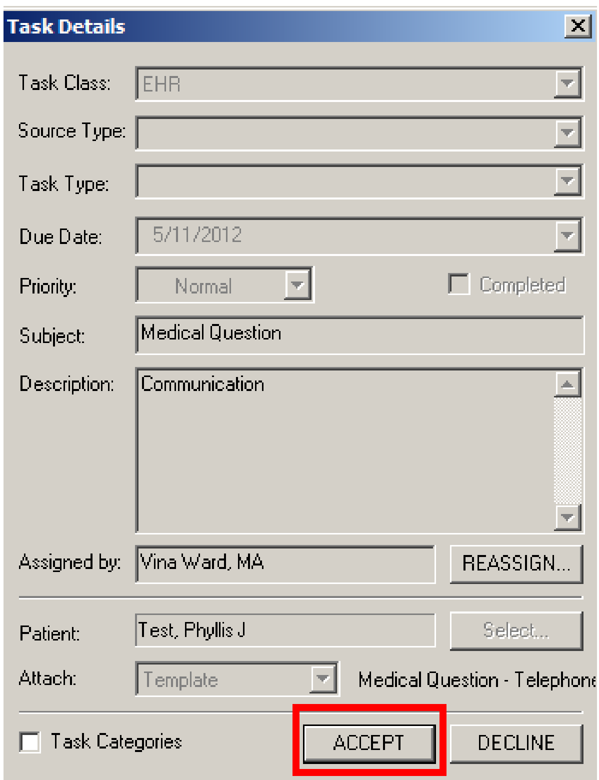
- A workgroup has multiple people built into it.
- If you want to add someone to your favorties folder so you don't have to scroll down and find their name, right click their name from the list, and click Add Favorite.



RESPONDING TO A MESSAGE

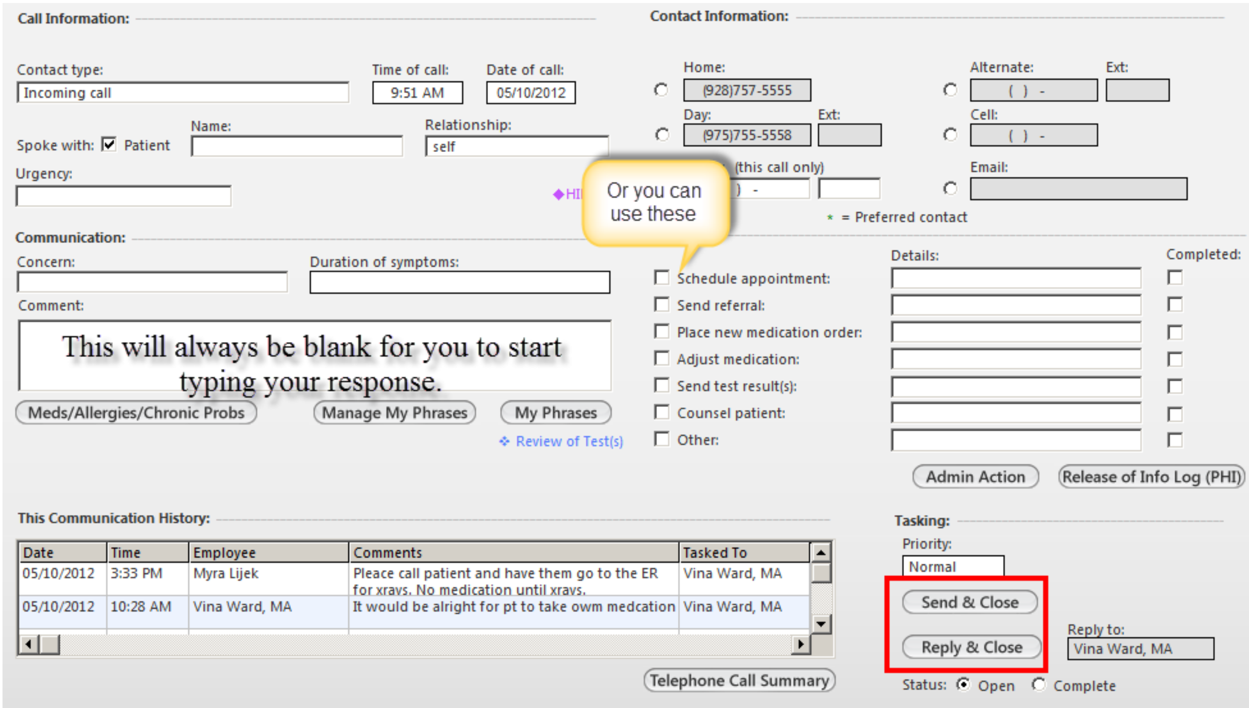
1. When you receive a new task in your inbox it will be bold.
2. Double click on the task to open it.
    a. Notice the type of message and the subject.

3. Click **ACCEPT**.

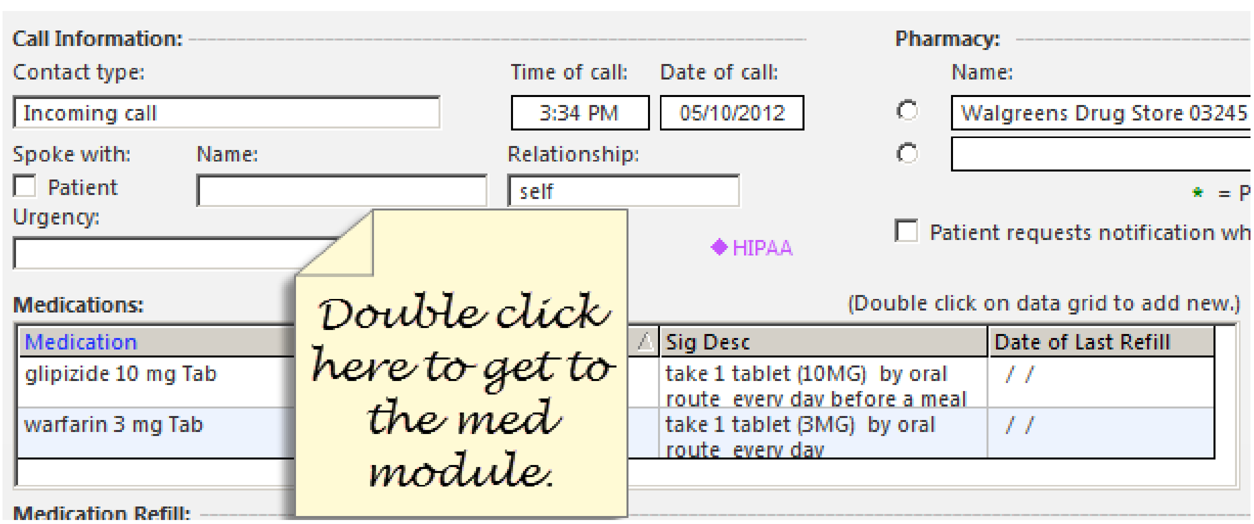


4. Click **Chart** in the bottom right.

5. This will take you directly to the template in which the original message was taken.
6. You can respond either using the checkboxes for a quick response or you can type in the Comments sections (which will automatically be blank for you to type your response.)



7. The Telephone Call templates do not automatically order anything; <u>you must still enter the referral, diagnostic order, or medication through the appropriate templates.</u>
8. To refill a medication from the Medication Management template, just double click in the Medications grid. The message has to have been sent using the Medical Management template.

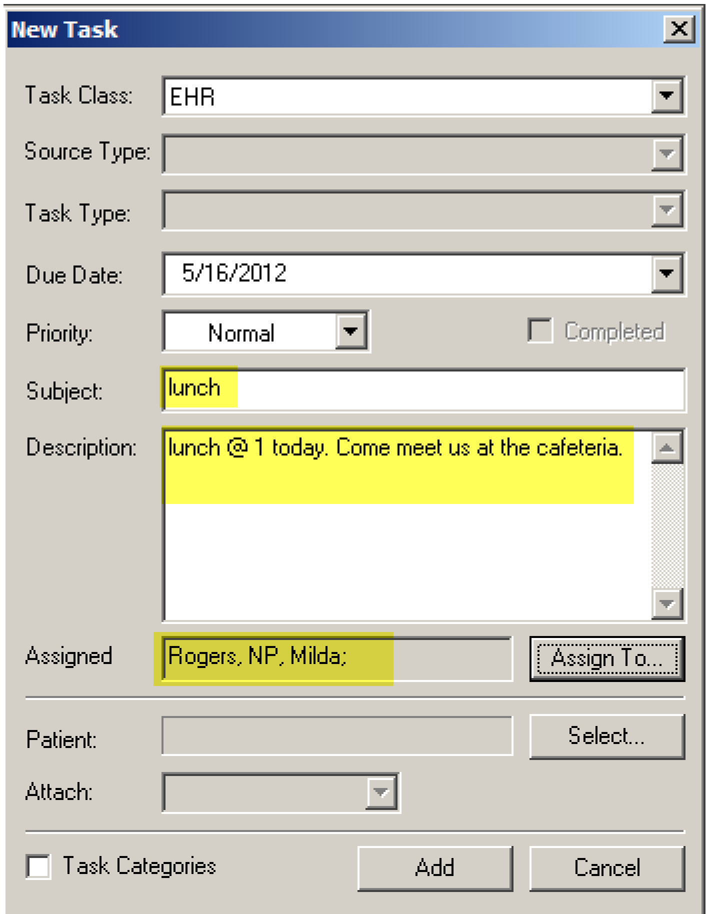


9. If you want to send it back to the person who sent it to you, select the button that says **Respond and Close.** Their name appears in the gray box to the right of the button.
10. If you want to send it to someone else, click the button that says **Send and Close.**
11. Select your recipient from the tasking list.
12. If you don't want to send it to anyone, then just click Save and Close at the bottom of the template.

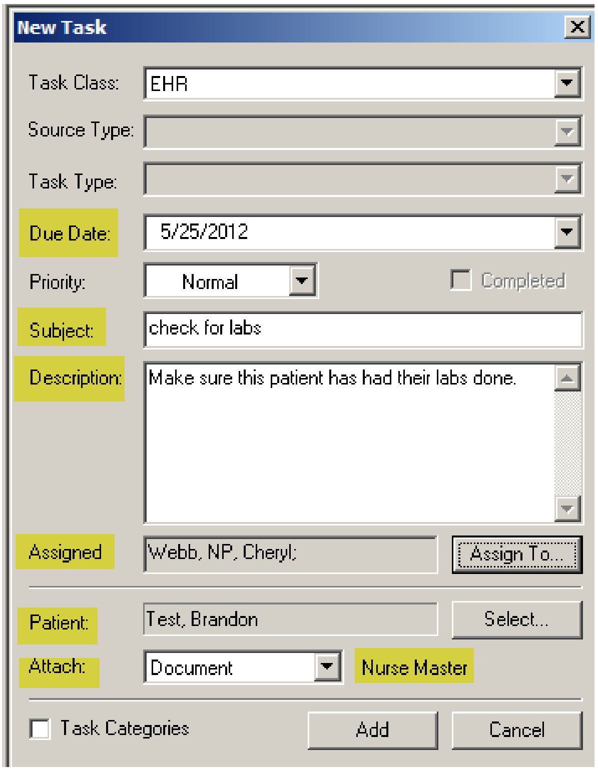
QUICK TASKING (**NOT A PART OF THE CHART**)

1. From the Inbox, click Add.

2. You can send it as an instant message, not pertaining to a patient.
3. Just fill out the description and click Assign To.



4. If you want to send a task pertaining to a specific patient, just make sure that it does not have any critical patient information. You can attach the task to a patient's chart, even a document or template within their chart. **EVEN IF YOU DO THIS, THE ACTUAL TASK DOES NOT LIVE IN THAT PATIENT'S CHART. YOU MUST PUT MEDICAL AND CLINICAL TASKS INTO A TEMPLATE (I.E. PROVIDER TEST ACTION OR COMMUNICATION TEMPLATE).**



5. This will ensure that when the received clicks on the chart button (after accepting the task), it will take them directly into that patient's chart and even right to the attached document or template.

Self-Tasking

1. You can send yourself a task by simply leaving the task recipient box EMPTY. This will force the task into your own inbox.

Task Icons

ICONS: the following icons represent - -

 An unassigned task

 A task created by the current user and assigned to another user(s)

 A task created by the current user that has been assigned to another user and accepted

 A task created by another user that has been assigned to the current user

 A task created by another user that has been assigned to the current user and accepted

 A task created by another user that has been assigned to the current workgroup and declined by the entire workgroup