NextGen EHR How-to Guide
Tasking in the EHR

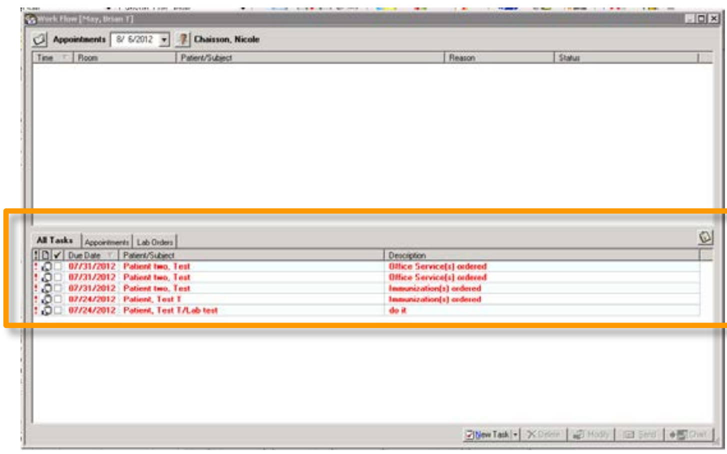
This guide will help you send and complete tasks in the EHR.

Note: Tasking in the EPM is separate from EHR. To send a task to book an appointment, update patient demographics, etc., See *EPM How-to Guide 7*.

I. View Tasks

A. Click on the Work Flow *Inbox* button on the EHR toolbar.

B. Both task you have assigned have tasks assigned to you will appear in the lower section of the Work Flow Manager.



Hint: See the Advanced Training section of this guide on how to make this screen easier to use.

C. Double-click on a task to view it.

II. Accepting a Task

A. You can tell what the task is about by the *Source* and *Task Types*.

B. Note the *Due Date* and *Priority Level*.

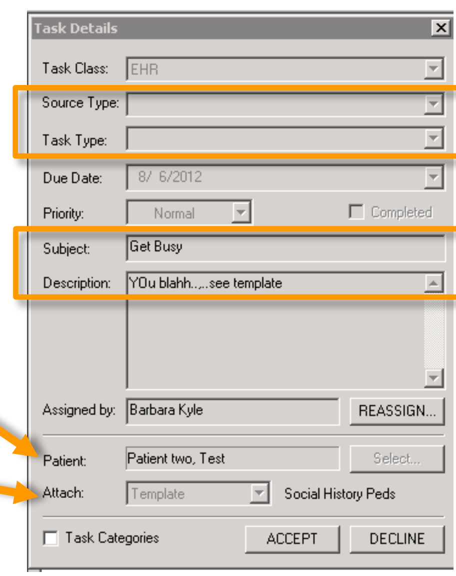
C. The sender will have entered a *Subject* and *Description* of what needs to be completed.

D. You can see the patient chart the task is linked.

E. The template, document, etc this task is attached to will appear here.

F. Accept the task by clicking the button.

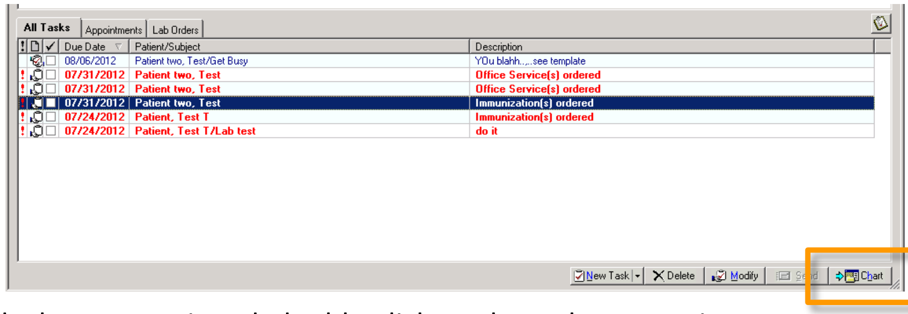
G. You will be taken back to the Work Flow Manager.



III. Completing the Task

A. Select the accepted task.

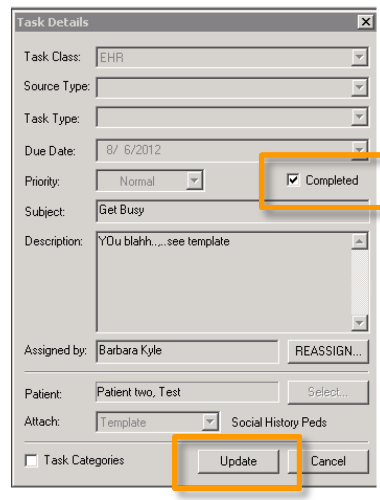
B. Click on the Chart button and you will be taken to wherever the task was linked.



C. When you have completed what was assigned, double-click on the task to open it.

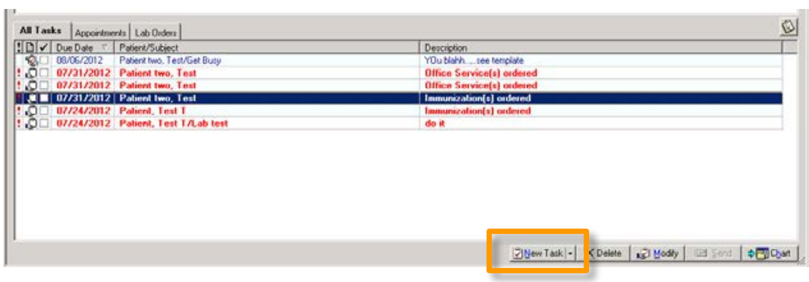
D. Check the *Completed* box.

E. Click on the *Update* button.



IV. Assign a Task

A. In the Work Flow Manager, click on the *New Task* button and select *EHR Task*.



Note: It is not recommended to send a task from the EHR to the EPM.

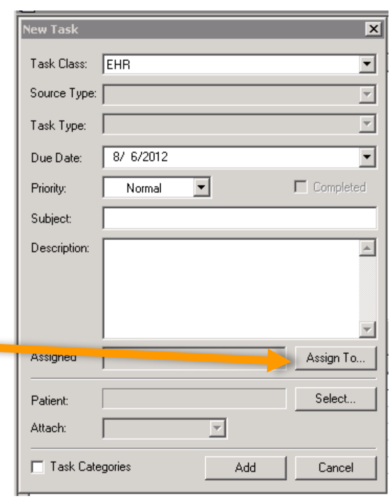
B. Enter the *Due Date*.

C. Select the *Priority*.
Only change a priority from *Normal* if the task is a special circumstance.

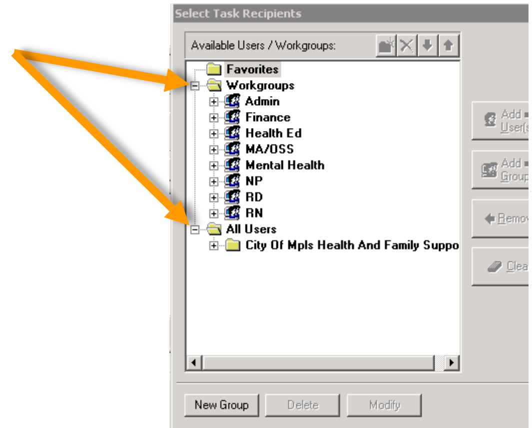
D. Enter the *Subject* if it doesn't already have one

E. Enter or add to the *Description* of what needs to be completed.

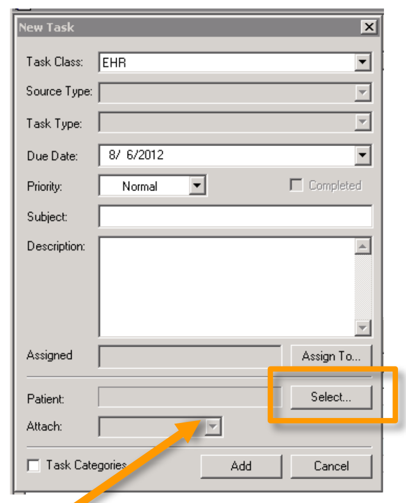
F. Click on the *Assign To…* button



1. Find the person you are assigning the task either under a *Workgroup* or *All Users*



2. Double-click on the person's name.
3. If a patient has not already been selected, click on the *Select…* button



G. Attach a template, document or other EHR element to the task. This is where you want the person to complete the task.

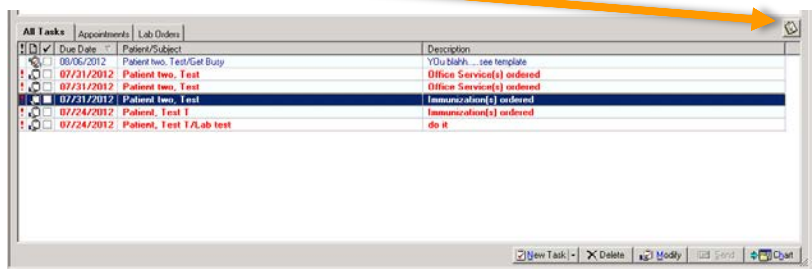
H. Click the *Add* button.

Advanced Training: Work Flow Manager Customization
This section is not required, but offers extra tips on how to customize the Med Module for easier use.

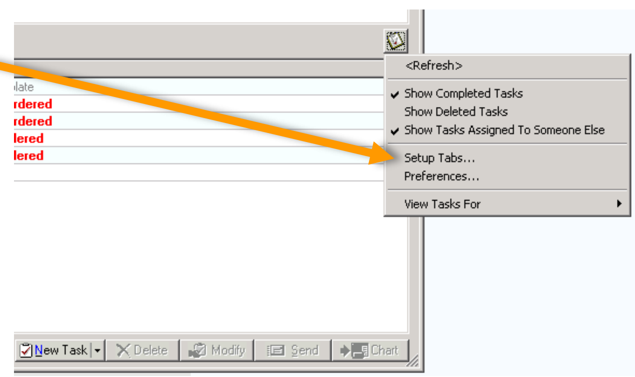
I. Task Tabs

You can organize your tasks by setting up tab types.

A. In the Work Flow Manager, click on the *Task* button



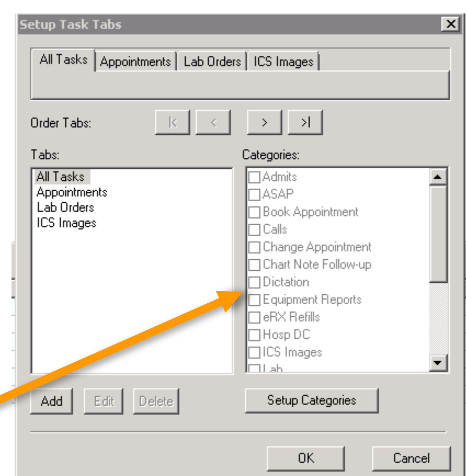
B. Select *Setup Tabs*



C. Click on the *Add* Button

1. Type the name of the tab you want to create.
   Suggestions are Labs & Orders, Appointments, Images

   Note: If you are a MA/OSS, NP or RN, you will need to add an eRX Refills tab for E-Prescribing.



2. Select the task categories that are related to the tab you're creating

3. Repeat for each tab you want to create.

Congrats! You are done with this How-to Guide.