

Nextgen  
Out Of Office Tasking  
Demonstration

# Out Of Office Tasking

Residency programs are like large group practices full of part-time physicians, since most everyone only sees patients a few half-days a week. This means providers often have to cover for each other, following complicated & frequently-changing coverage schedules. NextGen isn't really designed to optimally help us with this, so customer service, & potentially patient care, can suffer.

# Out Of Office Tasking

Wouldn't it be better if you could just send tasks to the proper provider without worrying whether or not s/he is on duty? Then have the EHR route the task to the coverage partners if the intended recipient is off duty?

We have installed changes in the program that allow this, if your practice chooses to implement this workflow. Here's how it works.

# Tasking Workflow & Expectations

- If a provider will be officially off-duty for an entire business day, s/he should log as **Out of Office** in NextGen.

The screenshot displays the NextGen EHR interface for a patient named ARGULA AATESTDUFFY. The top menu bar includes 'File', 'Edit', 'Default', 'View', 'Tools', 'Admin', 'Utilities', 'Window', and 'Help'. The 'Admin' menu is open, showing options such as 'Work Flow Manager', 'Advanced Audit Setup...', 'User Password...', 'E-Mail Profile...', 'System Password...', 'Modify Inclusion/Exclusion List...', 'Share Inclusion List', and 'Active Modules...'. The 'Work Flow Manager' option is highlighted with a green box. A secondary menu is open over 'Work Flow Manager', with the 'User...' option highlighted in green. The background shows patient information, including 'Address: 52 SKID...', 'MOBILE...', 'Contact: (251) 55...', and 'Weight: 166.00 lb (75.30 Kg)'. The date and time at the bottom are '09/14/2014 12:14 PM : '\*USA'.

Office Status

Provider: DUFFY, ROBERT LAMAR MD

User:

Is currently:  In the Office  **Out of the Office**  Scheduled

**Out of the Office. All delegates will have access to your PAQ and Work Flow items.**

**Do not enter names here; this will be set up for you.**

Delegates

**Providers** | Users

- ACELAJADO ONOYA, MARIA CZA...
- ACKER, BRENT MD
- AHMAD, SAJJAD MD
- AIKIN, STEPHANIE PA-C
- AKINSANYA, OLAJIDE M MD
- AL GHAFRY, MAHA MD
- ALASS, FADI AMIN MD
- ALI, MOHAMMED FARHAN MD
- ALIAN, MOHAMMAD MD
- ALKILANI, AHMAD MD
- AL-NUFAL, MOHAMMED MD
- ALONSO, JORGE E MD
- ALWEISS, JOSHUA BARAM MD
- ANDERSON, STEPHANIE JEANI...
- ARAJI VILLATORO, FAYRUZ MD
- ATKINSON, TANGELA C MD
- AUNE, CATUARINE SRND

Add >>

<< Remove

Clear



Add >>

<< Remove

Clear

Provider Approval Queue | **Work Flow**

Name	
<b>Use Always</b>	
<b>Use Only When Out of the Office</b>	

**Remember to log yourself as In the Office as soon as you return.**

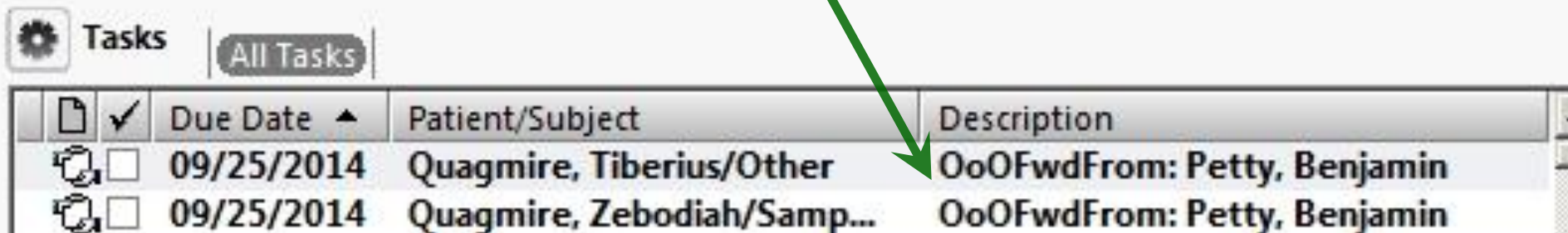
Delegates are allowed to accept and reject PAQ items on your behalf

OK Cancel

# Tasking Workflow & Expectations

- Office staff will send tasks to the appropriate provider (usually the PCP), *regardless of whether the provider is on or off duty.*
  - DON'T send tasks to a GROUP—just the PCP.
    - If you specifically need 2 different providers to see a task, send an individual task to both.
- If the provider is logged as **Out of Office**, the task will be forwarded to the provider's teammates.

The task description will indicate that it is an **Out of Office Forwarded** task. In this example, FM-Blue team members see tasks sent to their teammate Dr. Petty while he is Out of Office.

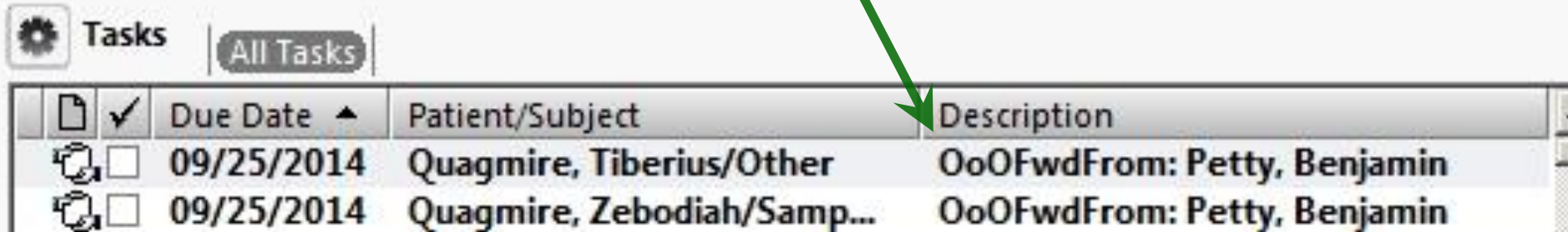


The screenshot shows a task list interface. At the top left, there is a gear icon and the word "Tasks". To its right is a button labeled "All Tasks". Below this is a table with the following columns: a checkbox, a checkmark, "Due Date", "Patient/Subject", and "Description". Two rows of tasks are visible, both with a due date of 09/25/2014. The first row's patient is "Quagmire, Tiberius/Other" and the description is "OoOFwdFrom: Petty, Benjamin". The second row's patient is "Quagmire, Zebodiah/Samp..." and the description is "OoOFwdFrom: Petty, Benjamin". A green arrow points from the text above to the "Description" column header.

<input type="checkbox"/>	✓	Due Date ▲	Patient/Subject	Description
<input type="checkbox"/>		09/25/2014	Quagmire, Tiberius/Other	OoOFwdFrom: Petty, Benjamin
<input type="checkbox"/>		09/25/2014	Quagmire, Zebodiah/Samp...	OoOFwdFrom: Petty, Benjamin

If everyone clears their task lists daily, all of these tasks will be completed every day. If all providers do this in a conscientious manner, no one should have to handle more than a couple of these each day. When one teammate accepts the task, it will drop off everyone else's task list.

Any tasks not yet accepted by teammates will still be visible to the PCP when s/he returns to the office.



The screenshot shows a task management interface. At the top left, there is a gear icon and the word "Tasks". To its right is a button labeled "All Tasks". Below this is a table with the following columns: a checkbox, a checkmark, a "Due Date" with an upward arrow, "Patient/Subject", and "Description". Two rows of tasks are visible, both with due dates of 09/25/2014. The first row's patient is "Quagmire, Tiberius/Other" and the description is "OoOFwdFrom: Petty, Benjamin". The second row's patient is "Quagmire, Zebodiah/Samp..." and the description is "OoOFwdFrom: Petty, Benjamin". A green callout box from the text above points to the "Description" column header.

<input type="checkbox"/>	✓	Due Date ▲	Patient/Subject	Description
<input type="checkbox"/>		09/25/2014	Quagmire, Tiberius/Other	OoOFwdFrom: Petty, Benjamin
<input type="checkbox"/>		09/25/2014	Quagmire, Zebodiah/Samp...	OoOFwdFrom: Petty, Benjamin



Sometimes you'll want to let the PCP know about a task you handled while s/he was gone. Using the **Reminder Task template** is a good way to send the PCP a task that will appear on the future day when s/he returns.

ARGULA AATESTDUFFY (F)    DOB: 01/02/1959 (55 years)    Weight: 166.00 lb (75.30 Kg)    Allergies: (1)    Problems: (2)    Diagnoses: (3)    Medications: (2)

Address: 52 SKIDOO    MRN: 000900056151    Marital Status:    PCP: DUFFY, ROBERT LAMAR ...  
MOBILE, AL 36604    Insurance: AFLAC    Pharmacy 1:    Referring:  
Contact: (251) 555-1111 (Home)    NextMD: No    Pharmacy 1 Phone:    Rendering: DUFFY, ROBERT LAMAR ...

Alerts    OBGYN Details    Patient Dem...    **USA Reminder Tasks**    Order Admin...    Sticky Note    Referring Provider    HIPAA    Advance Directives    Screening Summary

09/14/2014 12:14 PM : "\*USA Histories 836"    USA Reminder Tasks x

## Reminder Tasks

Save & Close

Reminder Recipient (can be yourself): Perkins, Allen

Months from Now

Reminder Date: 10/13/2014    1    2    3    4    5    6    9    12  
(Date you wish reminder to be received)

Topic/Description: Lab result

Details/Comments: See the lipid panel that came in while you were out. I'll let you decide whether or not you want to titrate the atorvastatin.

Click to send reminder task    Send Task

Patient's Next Appointment

see all appt's

### Existing Reminder Tasks

Display  all     uncompleted     completed     Enable row selection to copy existing order

Due Date	Topic/Description	Details/Comments	Reminder Recipient	Completed By	Ordered By	Date Ordered
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Further details about the use of **Reminder Tasks** are available in another lesson.