

TASK AND PAQ COVERAGE

Cross-coverage for phone calls, refill requests, lab results, etc. always poses a problem for residency programs. Since faculty and residents alike are all essentially part-time providers due to other academic duties, we've always had to cover for each. This can become confusing and inefficient, risking delayed responses, inconsistent customer service, and medical errors.

Every clinic has evolved processes to work around these problems, but now that we have reliable remote access to NextGen, we have the potential to better manage task coverage.

The general idea is that everyone should handle their own tasks and PAQ items once every working day, whether you physically come to the office or not. This way no one provider will have to address a large number of tasks, and more importantly, you'll only be handling tasks for patients you're familiar with, rather than trying to read the minds of your comrades. It will provide better service for your patients, since no one should go more than one business day without having their questions addressed.

However, there will still be times when providers will need to cover for each other, e.g. for vacations, meetings, or duty-hours-mandated reasons. In this case, you'll need to log yourself as "Out of Office" in NextGen. While this has been covered before in most people's training, many users may not recall the details, so let's review that for everyone.

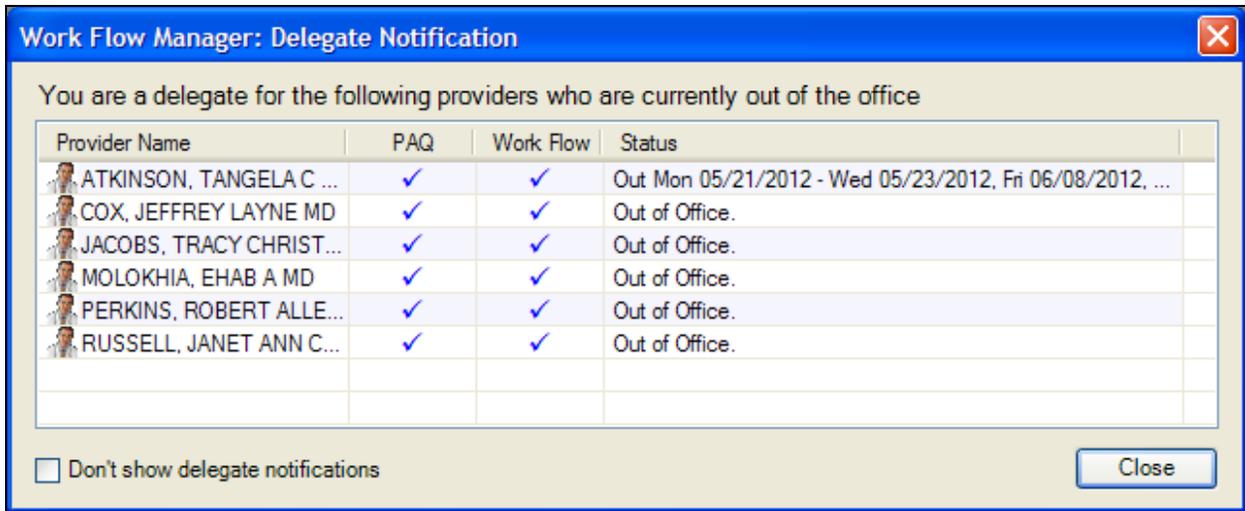
To log yourself as Out of Office, on the NextGen Menu Bar, go to **Admin|Workflow Manager|Provider**. At the top of this screen, you'll see:



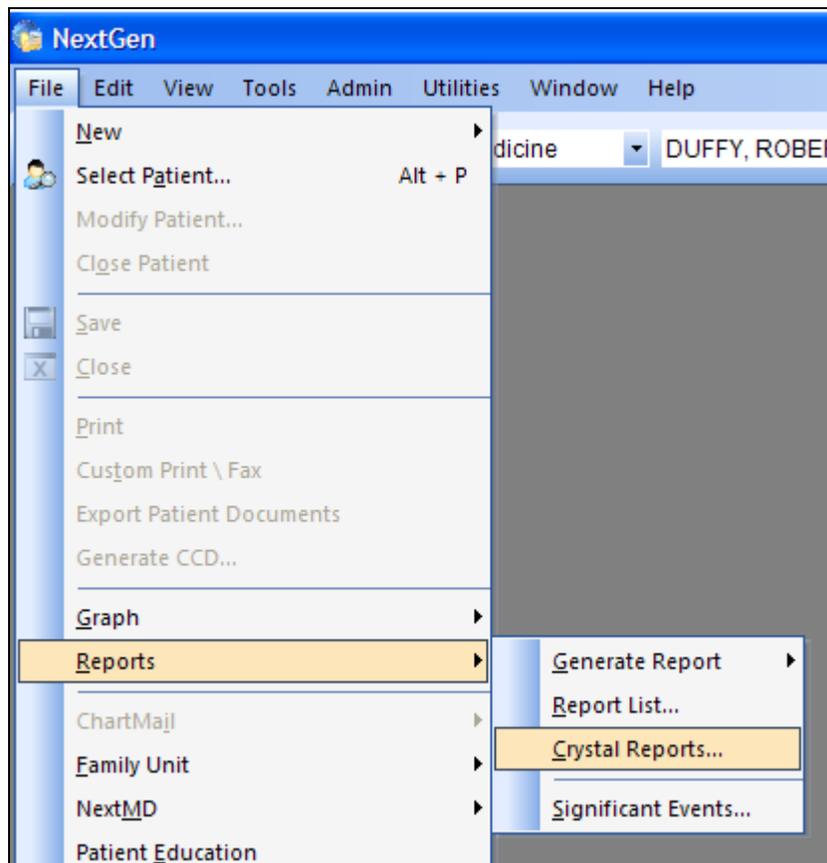
The easy, manual way to do this is to click the bullet for **Out of the Office**. The first time you log in after returning, you'll be asked if you want to log yourself as back in the office, which you should do.

An alternative, which is also easy and intuitive, is to click the **Scheduled** bullet. You'll be presented with calendar popups that allow you to specify when you'll be leaving and returning.

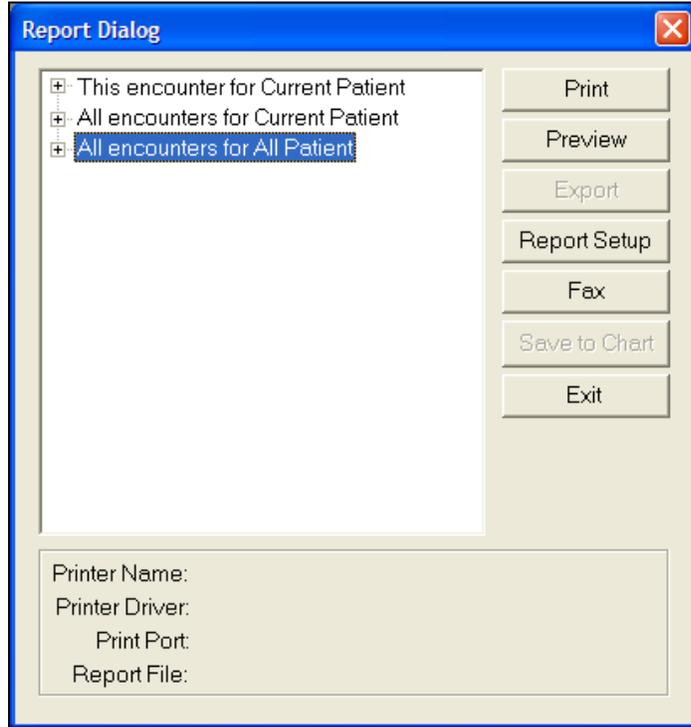
Now, whenever other providers in your office log on, they will see a notification like this:



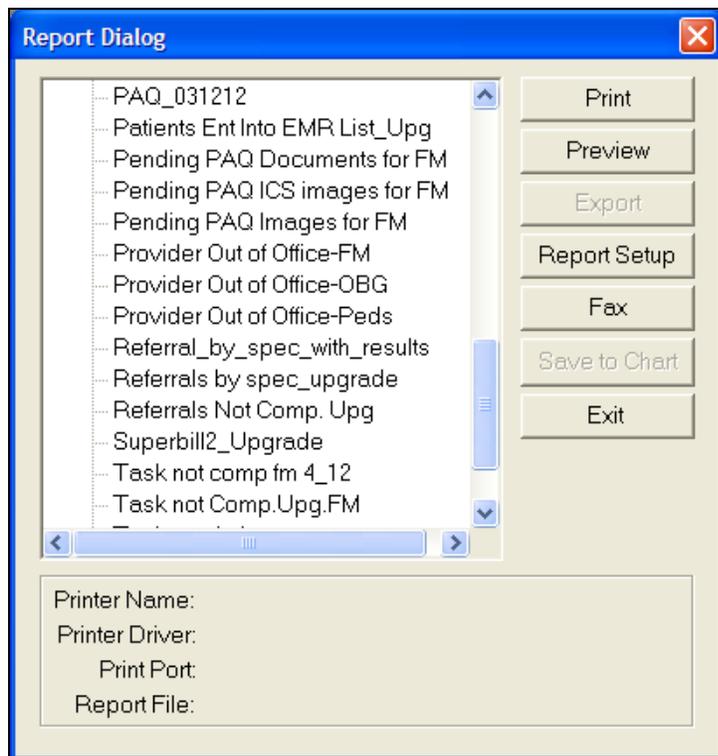
Any time you want to refresh your memory on who is out of office, you can do so through the reporting process. Go to File|Reports|Crystal Reports:



Next, expand **All encounters for All Patient**:



Then scroll down and find **Provider Out of Office**; you'll see several variants by specialty:

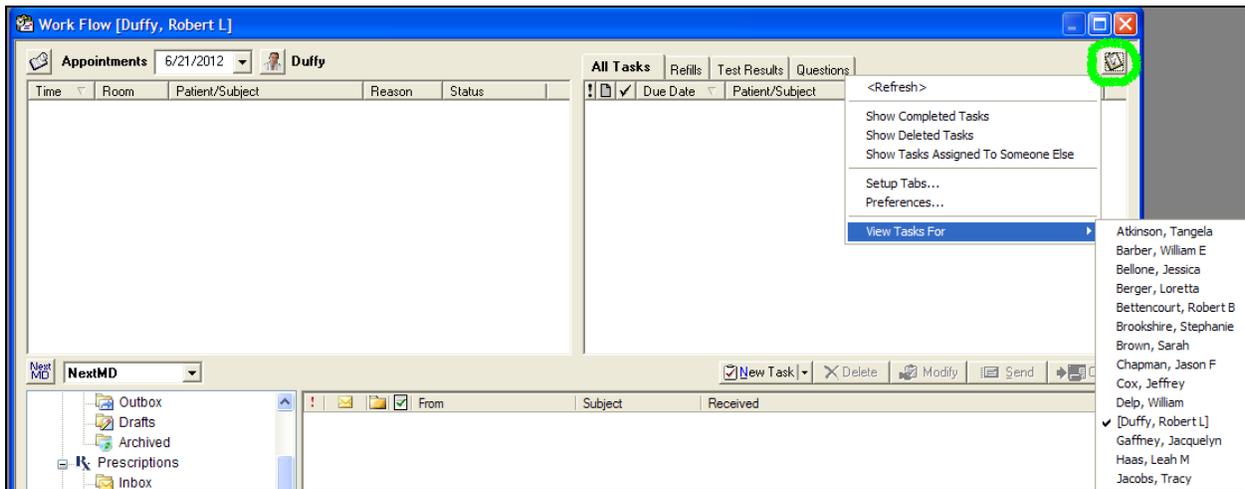


Select the desired specialty and click **Preview**, and you'll see a list of all providers currently logged as Out of Office:

Family Medicine Providers Currently Out of the Office	6/21/2012	5:15:38 PM
FAMILY MEDICINE MOLOKHIA, EHAB PERKINS, ROBERT RUSSELL, JANET		
RESIDENT COX, JEFFREY JACOBS, TRACY		

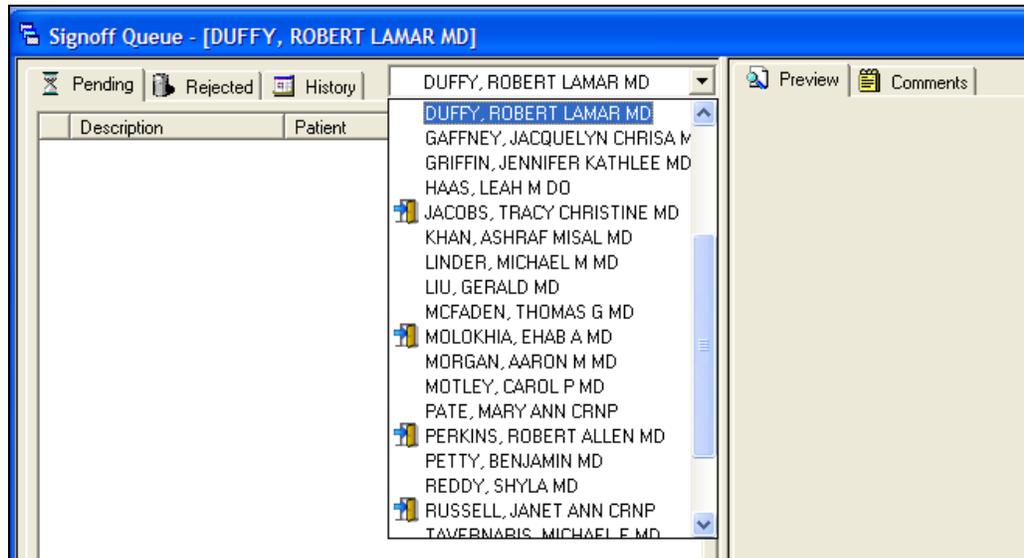
To cover for your partners, we have two workflow variants.

The first is to view your partners' tasks manually, which is NextGen's default workflow. Say you know you need to cover for your teammate, Dr. Cox. To view tasks that may have been sent to Dr. Cox, open your Inbox/Workflow, then click the notepad icon at the upper right of your task list. Next click on **View Tasks For**, and select Dr. Cox:



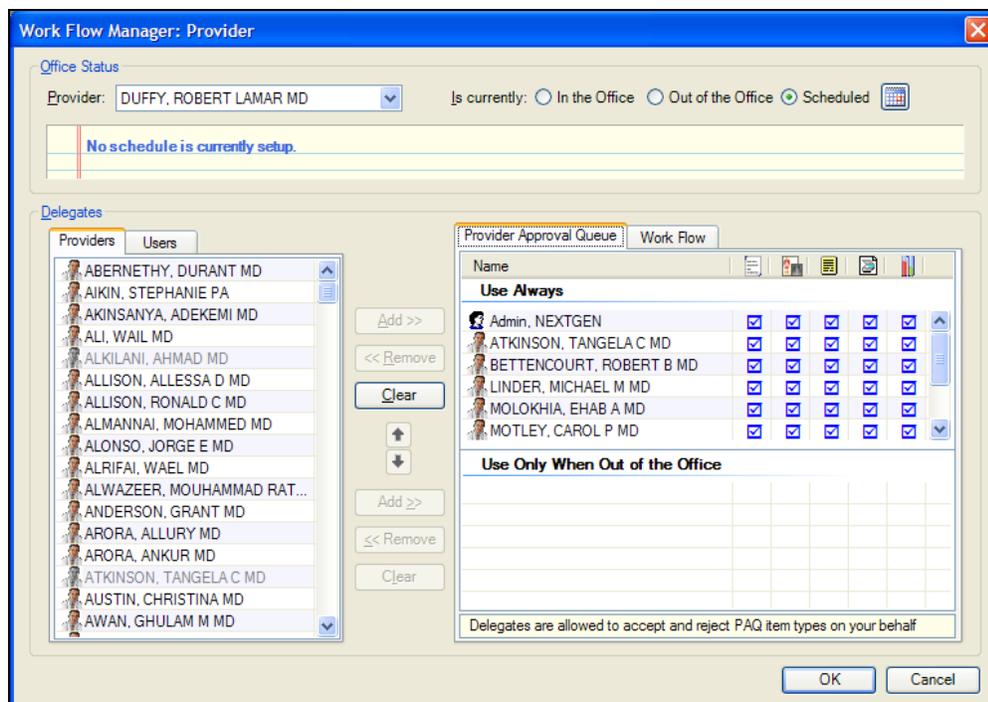
Now instead of seeing your own task list, you'll see his. While each clinic will probably establish its own policy, in general you'd want to answer questions, address test results, etc., that are urgent enough that they can't wait until this team member returns to duty.

Similarly, to view the PAQ items for your teammate, open the PAQ, & click the dropdown provider list, scrolling to the desired provider:

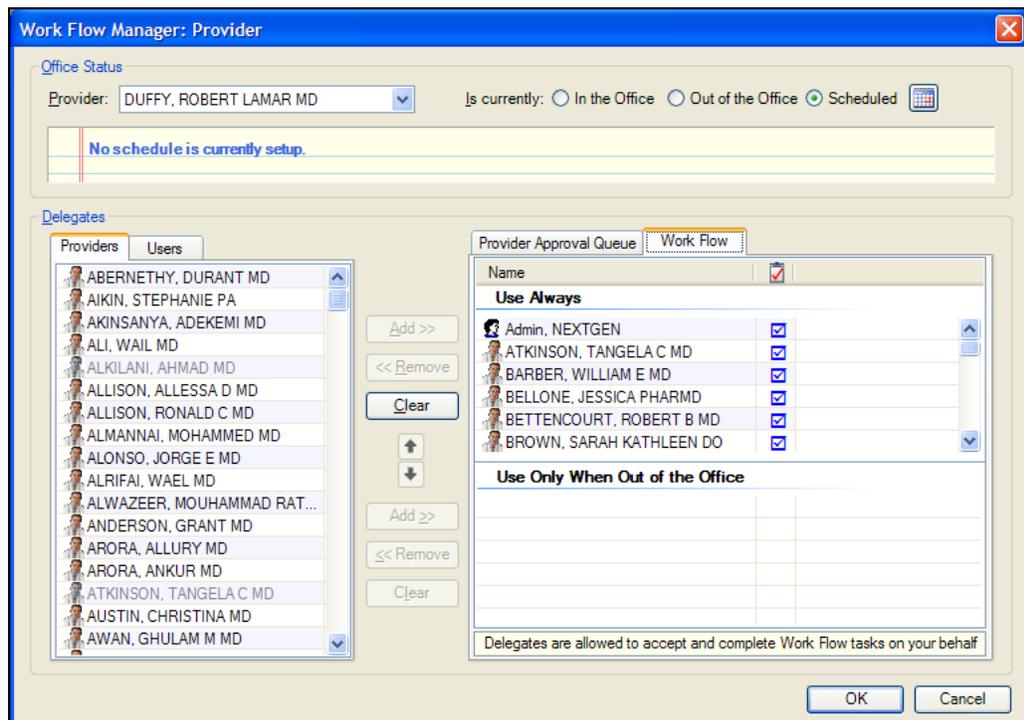


Visit notes for signoff can be left until the provider's return, but you want to make sure that a test result, letter, or other item that needs immediate attention is taken care of.

For general use, that is all most people need to know. To get this to work properly, however, there is a little bit of setup that is necessary. Note at **Admin|Workflow Manager|Provider** there is the opportunity to choose who can cover your Provider Approval Queue (PAQ):



And your Work Flow (Task List):



This can get complicated, having to add providers for each category, and whether they can only view your items when you're gone or all the time. While it *can* be done individually, we recommend that this setup be done for everybody by clinic supervisors, if necessary with the assistance of the EHR Team. You can get fancy with this, but in the examples above we've kept

it simple: All Family Medicine providers are able to view tasks & PAQ items for each other, all the time.

The second alternative workflow is to employ Out Of Office Task Forwarding, a program modification we installed October 2014. To see how that works, review the mini-lesson “Out Of Office Tasking.”