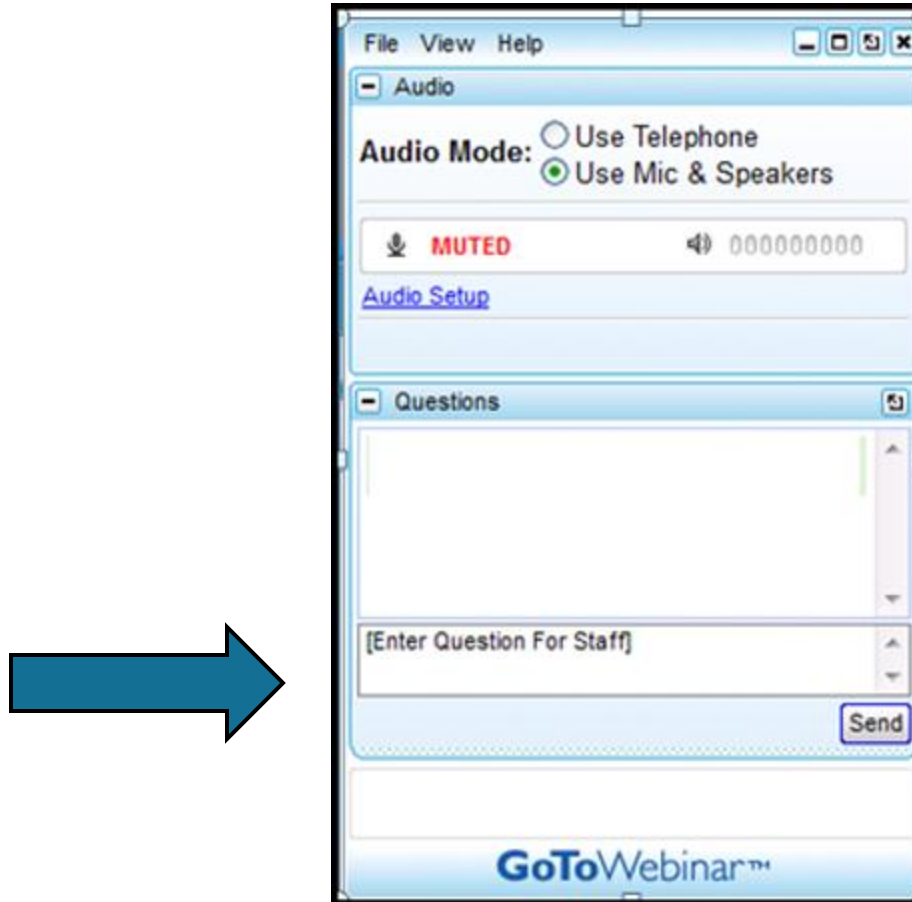


# Allscripts Enterprise EHR Tasking Fundamentals

# Tasking Fundamentals Outline

- **Tasking, Task Lists, Task Views**
- **Workflow Demonstrations**
- **Configuration Elements/Tools**
- **Clinical Scenarios/Task Solutions**
- **Considerations when it comes to Tasks/Task Views**

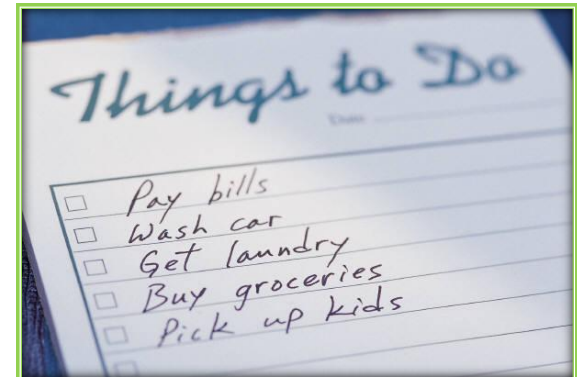
# Submit questions during the webcast



# What is a Task?

***A task is a request for information or a reminder to perform an action.***

- System Generated
- User Created



## *Tasks may be either:*

Delegated

- or -

Non-delegated



Please call the patient and tell her it's not good.

# What are Task Views?

***Tasks can be organized and filtered, based on task properties into groups of tasks called task views.***



## Two Types:

***Enterprise Views*** — are created or managed by a system administrator for use by all users at a site.

***Personal Views*** — are created by a specific user for his or her own use.

So...

***Tasks are organized into different task views, and then task views are assigned to individual users or teams of users to be worked. Tasks are presented to the user in the form of Task Lists.***



# Workflow Scenarios:

- ✓ Create a Manual Task
- ✓ Work the Task List
- ✓ Verify/Communicate Results
- ✓ Submit Encounter Form



# Tasking Configuration



## Associated Dictionaries

- Task Name
- Task Status
- Task Priority
- Team
- Remove Reason
- Reason for Call

## Task Admin

- Enterprise and User Views
- Manage Views for a User
- Custom Task Filters

# What's Behind the Front End?

The image displays two screenshots from a web application. The left screenshot, titled 'Task Detail -- Webpage Dialog', shows a task entry for 'Hospital Call' assigned to 'Allscripts, ClinicalStaff'. Annotations with arrows point to various fields: 'Task Name Dictionary' points to the task name dropdown; 'Team Dictionary' points to the assignee dropdown; 'Task Priority Dictionary (enforced)' points to the 'Urgent' priority dropdown; 'Task Status Dictionary (enforced)' points to the 'Active' status dropdown; and 'Task Name & Task Priority Dictionaries' points to the 'Overdue' date field. The right screenshot, titled 'Task Remove -- Webpage Dialog', shows a confirmation dialog for removing tasks. An annotation 'Remove Reason Dictionary' points to the 'No Longer Applicable' dropdown menu. The dialog includes a comment field, a warning about task removal, and 'OK' and 'Cancel' buttons.

# Task Priority Dictionary

TW Admin | Hide VTB | Tools | Help | Lock | Logoff

**Dictionaries** | Dictionaries

CareGuide Admin  
Charge Admin  
Chart Admin  
Comm Admin  
Concept Mapping  
Dictate Admin  
Dictionaries  
Document Admin  
Group Admin  
Note Admin  
Org Setup  
PHB Comp Admin  
PHB Sec Admin  
Pop Health Mgmt  
Preferences  
Queue Admin  
Provider Admin  
Results Admin  
Pt List Admin  
Report Admin  
Security Admin  
Task Admin  
TWUser Admin  
Utilities  
V10 Note Admin  
Work Def Admin

Dictionary: Task Priority | \*\*Enforced\*\* | 3 of 3 Total Items

Code	Name	Mnemonic	Inactive	Enforced
2	ASAP	ASAP	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Routine	Rou	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1	Urgent	Urg	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Detail 1**

Default Time Until Due:  Days

Add Picklist Report Search

Save Cancel

Allscripts

# Task Name Dictionary

TW Admin | Hide VTB | Tools | Help | Lock | Logoff

**Dictionaries** | Dictionaries

CareGuide Admin  
Charge Admin  
Chart Admin  
Comm Admin  
Concept Mapping  
Dictate Admin

Dictionary: Task Name | 185 of 185 Total Items

Name	Mnemonic	Code	Inactive	Enforced
ABN Follow-up	ABNFup	V41-02	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ABN Order Follow-up	ABNOrdFolp	ABNOrdFolp	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad Hoc Note	AdHcNote	103	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad Hoc Result	AdHcRsIt	104	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adjust Charges	CanChrg	V36-01	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Audit Order Int	AuditOrdl	AuditOrdl	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Auth Order Int	AuthOrdl	AuthOrdl	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authorize Non-Formulary Medication	AuthNonF	AuthNonF	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authorize Order	AuthOrd	V48-01	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authorized Order	AuthdOrd	AuthdOrd	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Task Action:  |  Delegate

Default OverDue Time by Priority:

Default Urgent Overdue Time:  Hours

Default ASAP Overdue Time:  Days

Default Routine Overdue Time:  Days

Copy To Note Options:

Complete the Task When Copy to Note

Default Encounter Type:

Default Note Type:

Add | Picklist | Report | Search

Allscripts | Save | Cancel

# Team Dictionary

TW Admin Hide VTB Tools ? Help Lock Logoff

Dictionary: Team 17 of 17 Total Items

Code	Mnemonic	Name	Inactive	Enforced
100	Encntr	Enc Followup	<input type="checkbox"/>	<input checked="" type="checkbox"/>
101	Results	New Results	<input type="checkbox"/>	<input checked="" type="checkbox"/>
103	EncFrm	Encounter Form Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
110V36	UPDPC	Update Paper Chart Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V4-01	PatReqTeam	Patient Request Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V4-02	MedTskTeam	Med Task Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V46-1	MedRec	Med Rec Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
UNK	UNK	Unassigned	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V90-1	EncRevTeam	Enc Review Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V90-2	ChgEdtTeam	Charge Edits Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V90-3	PtMrgTeam	Local Pt Merge Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V10-1	LabCharges	Lab Charges	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CCRVer	CCRVer	CCR Verification team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Trial	Trial	Clinical Trial	<input type="checkbox"/>	<input checked="" type="checkbox"/>
IT	IT	IT Support Team	<input type="checkbox"/>	<input type="checkbox"/>
L_NurseTri	L_NurseTri	L_Nurse Triage Team	<input type="checkbox"/>	<input type="checkbox"/>
CL_Elise	CL_Elise	Elises Task Team	<input type="checkbox"/>	<input type="checkbox"/>

Add Picklist Report Search

Allscripts Save Cancel

# Task Status Dictionary

TW Admin Hide VTB Tools Help Lock Logoff

**Dictionary: Task Status** \*\*Enforced\*\* 7 of 7 Total Items

Code	Mnemonic	Name	Inactive	Enforced
Act	Act	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Auto	Auto	Auto Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cmplt	Cmplt	Complete	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Del	Del	Deleted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
InProg	InProg	In Progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Inact	Inact	Inactive	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Rem	Rem	Removed	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add Picklist Report Search

Allscripts Save Cancel

User: twappadmin Site: TouchWorks Clinic User: Allscripts,AppAdmin System: Owens World Healthcare

# Task Filter 1,2,3 Dictionaries

The screenshot shows the TW Admin interface. The left sidebar contains a list of administrative functions, with 'Dictionaries' selected. The main window displays a table for the 'Task Filter One' dictionary. The table has columns for Code, Name, Mnemonic, Inactive, and Enforced. One entry is visible: Code 'PedFillOne', Name 'Pediatric Filter One', Mnemonic 'PedFillOne', Inactive (checkbox), and Enforced (checkbox). The status bar at the bottom shows '0 of 0 Total Items' and buttons for 'Add', 'Picklist', 'Report', 'Search', 'Save', and 'Cancel'.

Code	Name	Mnemonic	Inactive	Enforced
PedFillOne	Pediatric Filter One	PedFillOne	<input type="checkbox"/>	<input type="checkbox"/>

# Task Admin

TW Admin
Hide VTB

Manage Personal
Personal Views
Enterprise Views
Custom Task Filters

- Charge Admin
- Chart Admin
- Dictate Admin
- Comm Admin
- Dictionaries
- Document Admin
- Group Admin
- iHealth Queue
- Note Admin
- Concept Mapping
- Org Setup
- PHB Comp Admin
- PHB Sec Admin
- Preferences
- Printing
- Provider Admin
- Results Admin
- Pt List Admin
- Report Admin
- Security Admin
- Task Admin
- TWUser Admin
- Utilities
- V10 Note Admin
- Work Def Admin

## Manage Personal Views

**Views For:**  All

Name	Default	Description
My Active Tasks	Y	
Current Patient - Active		Show only Active tasks for the Current Patient
Current Patient - All		Show all tasks for the Current Patient
Encounter Followup Team		

Set as Default
Remove
Use

## Enterprise Views

Name	Description
Active Pt - Today	View to contain only those tasks that are meant to be worked
Adjust Charges	Billing Office view to contain Adjust Charges tasks generated when
Call Back Team - cls	Christine's practice view :)
Call Back Team - lct	
Current Patient - Active	Show only Active tasks for the Current Patient
Current Patient - All	Show all tasks for the Current Patient
Current Pt - Active (last 30 days)	Show only Active tasks for the Current Patient within the last 30

Add to My Views
Use





# Manage Personal Views

Manage Personal Personal Views Enterprise Views Custom Task Filters

## Manage Personal Views

Views For:

Name	Default	Description
My Active Tasks	Y	
Current Patient - Active		Show only Active tasks for the Current Patient
Current Patient - All		Show all tasks for the Current Patient
Encounter Followup Team		

**Enterprise Views**

Name	Description
Active Pt - Today	View to contain only those tasks that are meant to be worked
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Current Patient - Active	Show only Active tasks for the Current Patient
Current Patient - All	Show all tasks for the Current Patient
Current Pt - Active (last 30 days)	Show only Active tasks for the Current Patient within the last 30

# Personal

Manage Personal **Personal Views** Enterprise Views Custom Task Filters

### Add / Edit Personal Views

**For:** Allscripts,Kristie

**View:**

**Desc:**

**Filters:**  Is  Is Not

- Assigned To
- Created
- Created By
- Delegated
- Overdue
- Patient
- Priority
- Status
- Task

**Custom:**

**Sorts**

1	<input type="text"/>	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
2	<input type="text"/>	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
3	<input type="text"/>	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending

# Enterprise

Manage Personal | Personal Views | **Enterprise Views** | Custom Task Filters

## Enterprise Views

**For:** Enterprise

**View:**

**Desc:**

**Filters:**  Is  Is Not

- Assigned To
- Created
- Created By
- Delegated
- Overdue
- Patient
- Priority
- Status
- Task

**Custom:**

**Sorts**

1	(None)	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
2	(None)	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending
3	(None)	<input checked="" type="radio"/> Ascending	<input type="radio"/> Descending

# Custom Task Filters

Manage Personal | Personal Views | Enterprise Views | **Custom Task Filters**

## Custom Task Filters Setup

**PLEASE NOTE: You are limited to selecting 8 custom task filters for the enterprise. Once you select a custom task filter, it cannot be changed. The custom task filters you select will be applied to tasks created when the task filter is saved and in the future.**

Task Filter	Applies to Task Types	Eff Date	Required
<input checked="" type="checkbox"/> Billing Location	ABN Follow-up, Adjust Charges, Go to Enc Form, Mng Chg Edits (Manage Charge Edits), Print Enc Form, Request F/up Appt, Review Enc Form, Submit IP Enc, Submit Res Enc	27Aug2010	
<input checked="" type="checkbox"/> Chart Location	asdf, Call Back, Check Benefits, Check Benefits, Check Benefits - cls, Check Benefits - lct, Confirm Patient Address, Confirm Patient Cardholder Info, Confirm Patient Pharmacy, Document Appointment, ePat Message Failure, Error Results Verification,	27Aug2010	<input type="checkbox"/>
<input checked="" type="checkbox"/> Location	ABN Follow-up, Adjust Charges, asdf, Call Back, Check Benefits, Check Benefits, Check Benefits - cls, Check Benefits - lct, Confirm Patient Address, Confirm Patient Cardholder Info, Confirm Patient Pharmacy, Document Appointment, ePat Message Failure, Err	27Aug2010	<input type="checkbox"/>
<input checked="" type="checkbox"/> Requested Performing Location	asdf, Audit Order Int, Authorized Order, Call Back, Call Order, Check Benefits, Check Benefits, Check Benefits - cls, Check Benefits - lct, Confirm Patient Address, Confirm Patient Cardholder Info, Confirm Patient Pharmacy, Denied Financial Authorization,	27Aug2010	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site	asdf, Audit Order Int, Auth Order Int, Authorize Non-Formulary Medication, Authorize Order, Authorized Order, Authorized Rx, Call Back, Call In Failed Rx, Call In Rx, Call Order, Check Benefits,	22Jul2010	<input checked="" type="checkbox"/>

Save Cancel

# User Ability to Add or Edit Personal Views

**Tasks** | Task List | Worklist | Documents | Manage My Views | **Add / Edit My Views** | Clinical Desktop | Note | Printing Tasks

Schedule  
Patient  
Chart

**Select Patient** ▼

**Add / Edit My Views**

**For:** Medici,James

**View:** Active Patient [v] **New**

**Desc:** Type Description of View in this text box.

**Filters:**  **Is**  **Is Not**

- User:** [v] **All**
- Team:** [v]
- Current User**

**Sorted To**

- Assigned To
- Created
- Created By
- Delegated
- Overdue
- Patient
- Priority
- Status
- Task

**Sorts**

- 1 Priority [v]  **Ascending**  **Descending**
- 2 Time To Overdue [v]  **Ascending**  **Descending**
- 3 [v]  **Ascending**  **Descending**

**Patient Is** [Current Patient]

**And Status Is**

▶ Active

◀ In Progress

[v] [v]

**Delete View** **Save** **Cancel**

# SSMT – Task Name Defaults/Behaviors

## Headers for Task Name

Task Code	Task Name	Task Mnemonic	Inactive?	Security Code Name	Task Action	Urgent Due Date Default	Urgent Due Time Default	ASAP Due Date Default	ASAP Due Time Default	Routine Due Date Default	Routine Due Time Default	Delegate?	Creat
Unique code	Description	Unique Mnemonic	Y/N	Description	Description	# Days	# Minutes	# Days	# Minutes	# Days	# Minutes	Y/N	Y/Bla

# SSMT – Assign Task Views

## *Headers for Task View-Users*

User Name	Task Name	Task Owner User Name	Subsystem	Subset	Section	OrganizationID	Default?	Delete
User Name	Task Name	Task Owner User Name	Subsystem	Subset	Section	OrganizationID	Y/N	Y/N

# Enterprise Delivered

- Tasks
- Teams
- Views

order

**Document**

**CHARGE**

base

Note

Scan

**Rx**

result

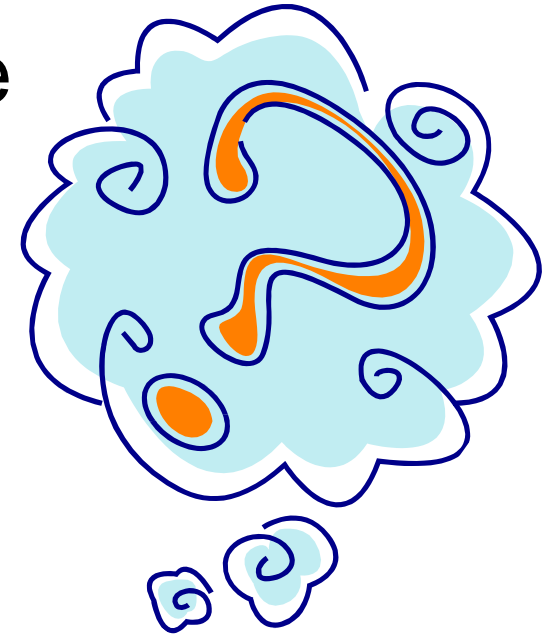
**CAREGUIDE**



# Task List vs. Worklist


Task List	Worklist
May or may not pertain to a patient	Always pertain to a patient
Assigned to an User or Team	Linked to a Patient
Throughout all clinical workflows	Order/Results based only

# Tasking Fundamentals Outline



- **Tasking, Task Lists, Task Views**
- **Workflow Demonstrations**
- **Configuration Elements/Tools**
- **Clinical Scenarios/Task Solutions**
- **Considerations when it comes to Tasks/Task Views**

<http://wiki.galenhealthcare.com/Webcasts>



Slides from this and previously recorded Galen webcasts can be found here!

**VitalCenter™**

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VitalCenter is a client-server application that delivers patient charts to the point-of-care to ensure business continuity. This Patent Pending technology enables physicians to access electronic copies of patient charts when the EHR is not available. From hardware failures to network outages and even scheduled maintenance, VitalCenter helps health care groups handle any downtime event. And, by offering instant access to records, VitalCenter can significantly increase efficiency during normal business circumstances as well. That's why multiple medical groups around the country rely on VitalCenter to keep them up and running with maximum efficiency.

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