

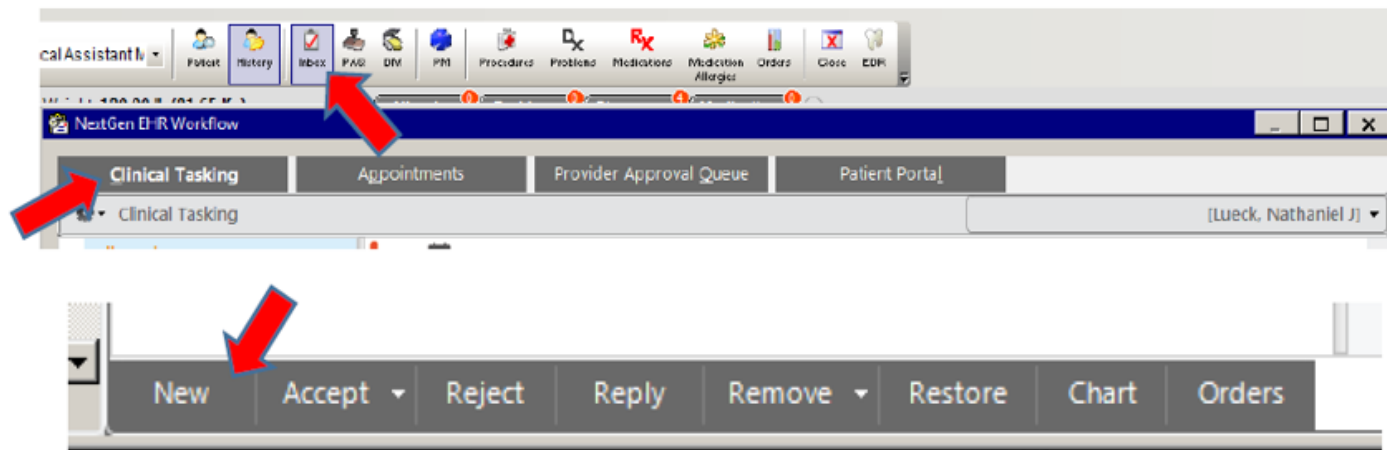
## Tasking a GLOBE Patient

When setting up new patient and/or newborn appointments, you can send a task to Medical Records to request information and attach a Globe patient in NextGen Inbox - Clinical Tasking. Providing Patient Specific Information – see [Script for Pt. Info](#), will greatly assist all staff in linking a conversation regarding new patients and gathering any information Medical Records can prior to an appointment.

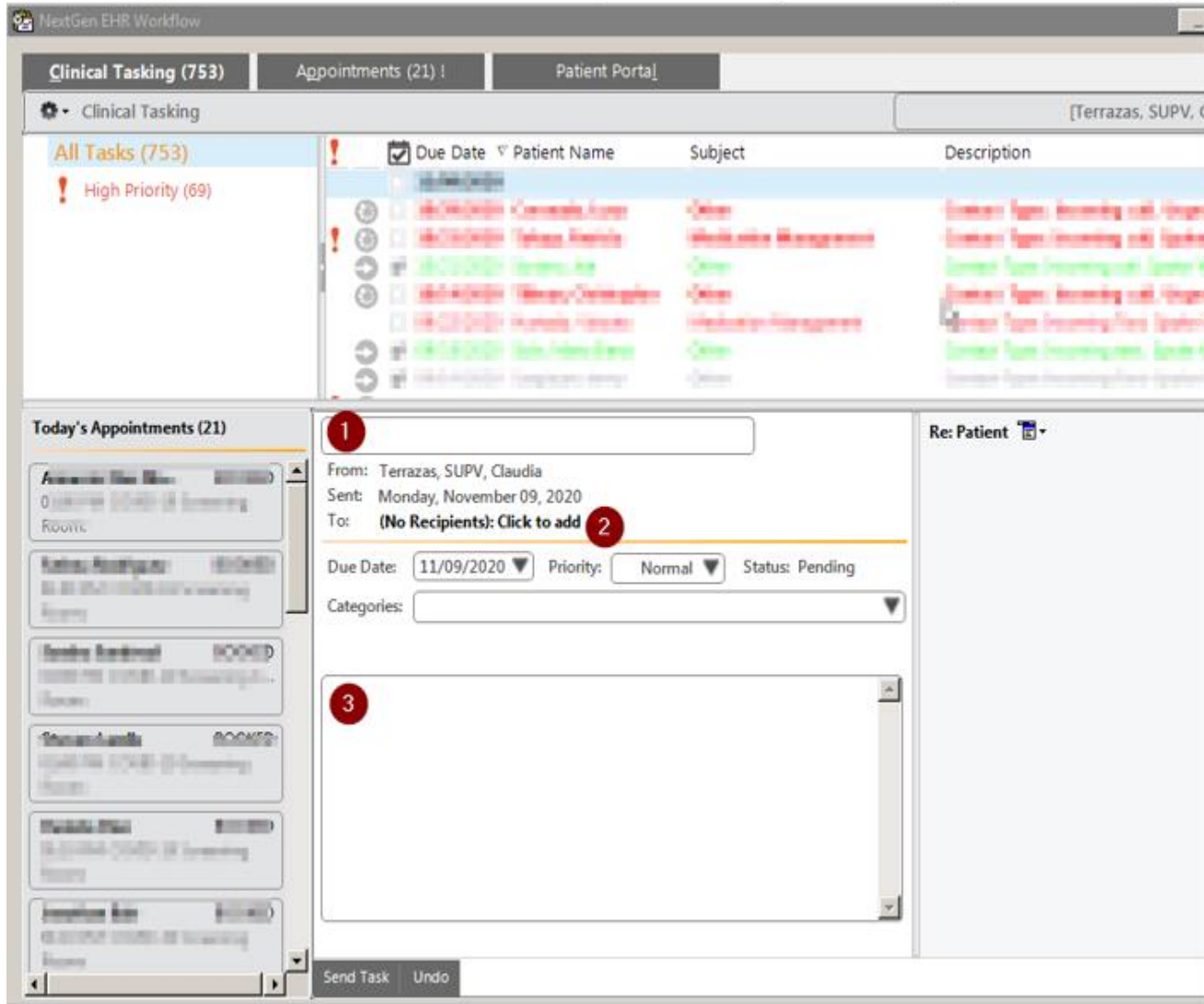
### 1. Click on EHR within NextGen



### 2. Open your inbox in EHR – Clinical Tasking and click New to begin a new task



This will create a new blank template for you to begin a tasking conversation.



The screenshot shows the 'NextGen EHR Workflow' interface. At the top, there are tabs for 'Clinical Tasking (753)', 'Appointments (21)', and 'Patient Portal'. Below the tabs, there's a 'Clinical Tasking' section with a table of tasks. The table has columns for 'Due Date', 'Patient Name', 'Subject', and 'Description'. Below the table, there's a 'Today's Appointments (21)' section with a list of appointment cards. The main area is a task creation form with the following fields:

- 1**: A text input field for the subject line.
- 2**: A 'To:' field with the text '(No Recipients): Click to add'.
- 3**: A large text area for the task description.

Other fields in the form include 'From: Terrazas, SUPV, Claudia', 'Sent: Monday, November 09, 2020', 'Due Date: 11/09/2020', 'Priority: Normal', and 'Status: Pending'. There are also 'Send Task' and 'Undo' buttons at the bottom.

1. Add your subject information

Example: Newborn or New Patient ER or Hospital Admission

2. Recipient should be to Medical Records by Region of where appointment was scheduled

See Step 3 on next slide

3. Copy your already filled medical record request template





## Tasking a GLOBE Patient

4. Click the **Re:Patient**  to open a Patient Lookup and search for your Globe Patient.

From: Terrazas, SUPV, Claudia  
Sent: Monday, November 09, 2020  
To: **(No Recipients): Click to add**

Due Date: 11/09/2020 Priority: Normal Status: Pending  
Categories:

**Re: Patient** 



Send Task Undo

Provider Approval Queue Patient Portal

**Patient Lookup**












Search Criteria

Last First / Nickname Middle Previous Last City Address Line 1 Zip Mother's Maiden Name

Social Security Birth Date Sex Home Phone Search By Med Rec Nbr Policy Nbr Enc Nbr



View By External System External ID Exclude Expired Patients

Matching Records

	Name	Patient Portal	Nickname	Maiden Na	Address
	Patient Do Not Use To, Test Blo..	Y	Audit 2		AUDIT USE ONLY PLS Merced, CA 9534
	Patient, Test	Y			857 W Childs Ave Merced, CA 95340 US
	Patient, Test	N			1910 Customer Care Way Atwater, CA 95
	Patient, Test	Y	Audit 1		AUDIT USE ONLY PLS Merced, CA 9534
	Patient, Test	N			857 W Childs Ave Merced, CA 95340 US
	Patient, Test	N	Female		123 Elm Reedley, CA 93654 USA
	Patient, Test	N			1234 Low Street Merced, CA 95341 USA
	Patient, Test	N	Baby		GVHC TEST PATIENT Hollister, CA 950
	Patient, TEST	N	AUDIT4		DO NOT USE PLEASE!! Atwater, CA 953
	PATIENT, TEST	Y	BOY PED		1058 Bill Street Modesto, CA 95855 USA
	PATIENT, TEST	N	DIQUAD		1121 HAMMOND ST Modesto, CA 95351

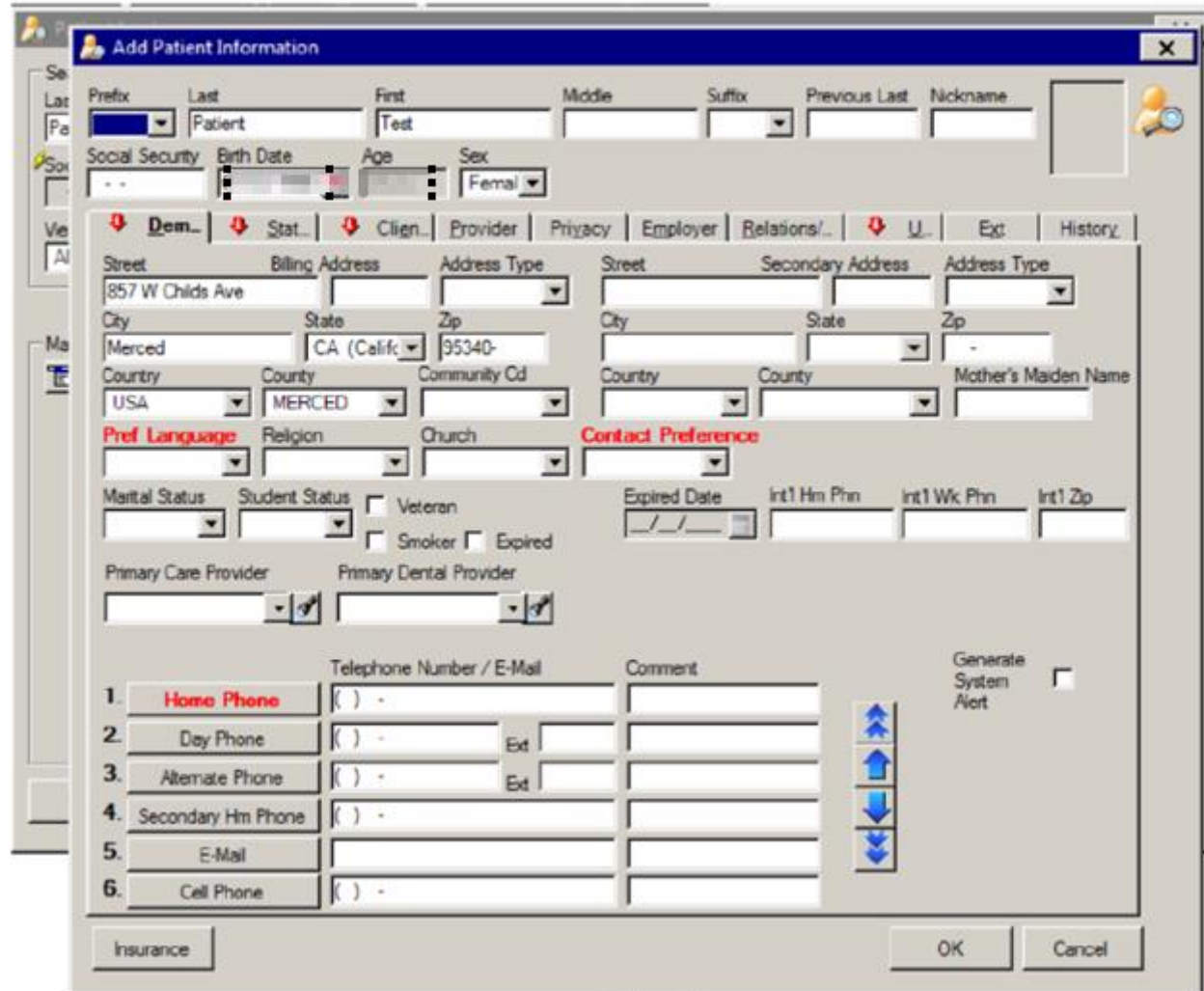
Records Found: 63

Clear Find Open Close

## Tasking a GLOBE Patient

a) Highlight and Open the Globe patient to view the Add Patient Information page



**Add Patient Information**

Prefix: Patient, Last: Test, First: , Middle: , Suffix: , Previous Last: , Nickname:

Social Security: --, Birth Date: , Age: , Sex: Femal

Dem., Stat., Clign., Provider, Privacy, Employer, Relations/..., U., Ext., History

Street: 857 W Childs Ave, Billing Address: , Address Type: , Street: , Secondary Address: , Address Type:

City: Merced, State: CA (Calif.), Zip: 95340, City: , State: , Zip:

Country: USA, County: MERCED, Community Cd: , Country: , County: , Mother's Maiden Name:

Prof Language: , Religion: , Church: , Contact Preference:

Marital Status: , Student Status: , Veteran: , Expired Date: / / , Int'l Hm Phn: , Int'l Wk Phn: , Int'l Zip:

Smoker: , Expired:

Primary Care Provider: , Primary Dental Provider:

	Telephone Number / E-Mail	Comment
1. Home Phone	( ) -	
2. Day Phone	( ) - Ext	
3. Alternate Phone	( ) - Ext	
4. Secondary Hm Phone	( ) -	
5. E-Mail		
6. Cell Phone	( ) -	

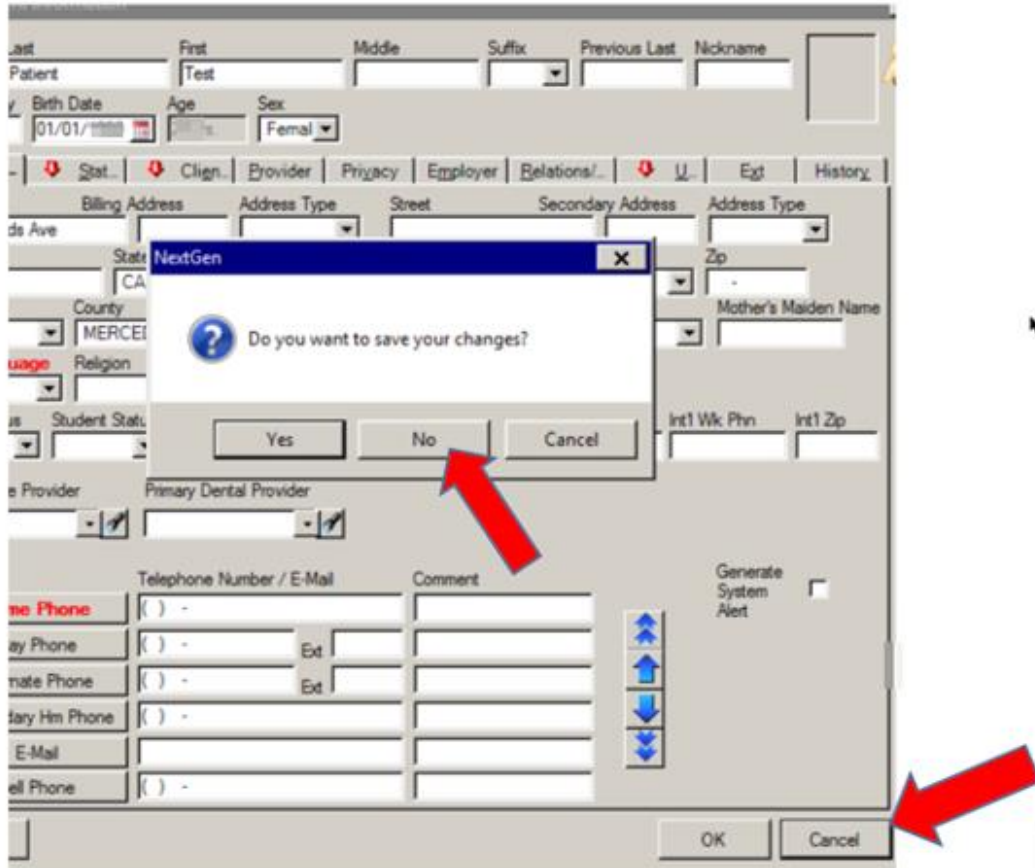
Generate System Alert:

Insurance: , OK, Cancel

## Tasking a GLOBE Patient

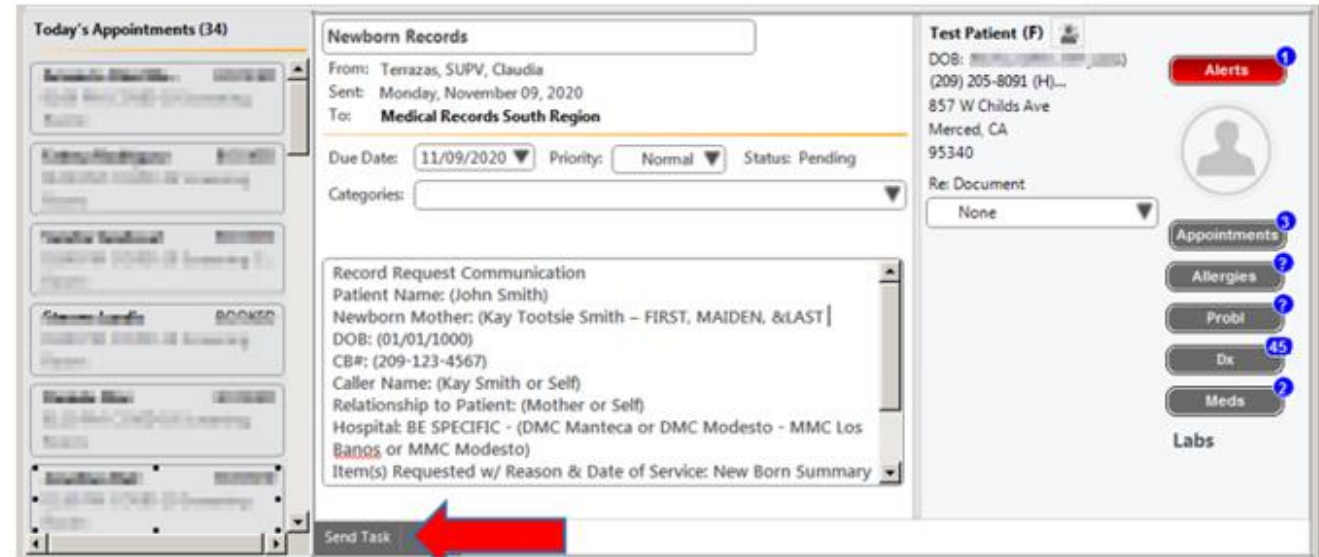
5. Without updating any information click on the Cancel tab

a) A second window will open asking if you want to save changes?  
Click No



The screenshot shows a patient information form with fields for Last, First, Middle, Suffix, Previous Last, Nickname, Birth Date, Age, Sex, Billing Address, Address Type, Street, Secondary Address, Address Type, State, County, Zip, Mother's Maiden Name, Religion, Student Status, Int1 Wk Phn, Int1 Zip, Primary Dental Provider, Telephone Number / E-Mail, and Comment. A 'NextGen' dialog box is open in the center, asking 'Do you want to save your changes?' with 'Yes', 'No', and 'Cancel' buttons. A red arrow points to the 'No' button. At the bottom right of the form, a 'Send Task' button is highlighted with a red arrow.

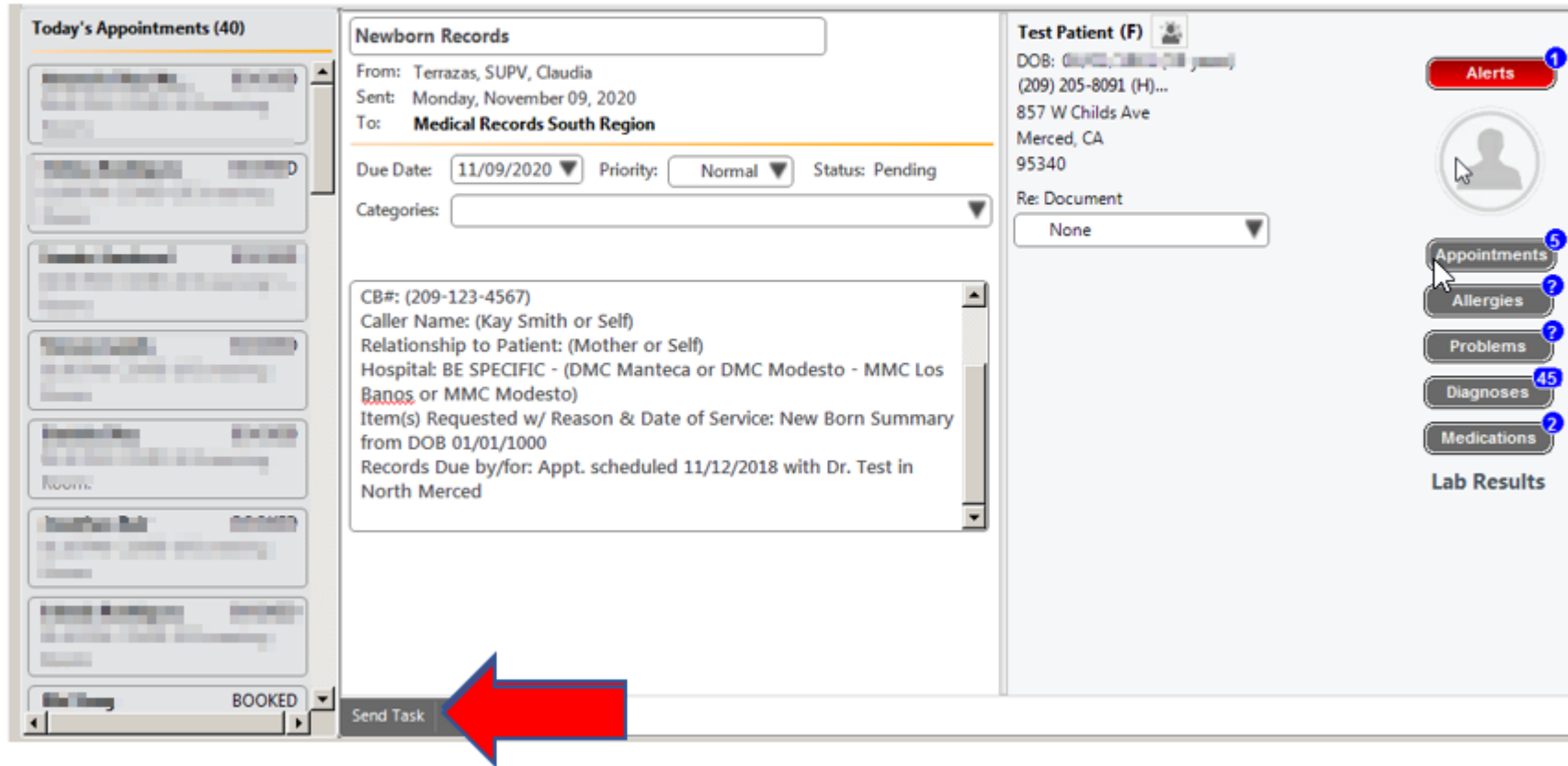
b) This will attach the globe patient's DOB & address to the template. Send the Task. This is the beginning of a documented communication in a request of records without a patient chart.



The screenshot shows a 'Newborn Records' form. The 'From' field is 'Terrazas, SUPV, Claudia', the 'Sent' date is 'Monday, November 09, 2020', and the 'To' is 'Medical Records South Region'. The 'Due Date' is '11/09/2020', 'Priority' is 'Normal', and 'Status' is 'Pending'. The 'Categories' field is empty. The 'Record Request Communication' section contains the following text: 'Patient Name: (John Smith)', 'Newborn Mother: (Kay Tootsie Smith - FIRST, MAIDEN, &LAST)', 'DOB: (01/01/1000)', 'CB#: (209-123-4567)', 'Caller Name: (Kay Smith or Self)', 'Relationship to Patient: (Mother or Self)', 'Hospital: BE SPECIFIC - (DMC Manteca or DMC Modesto - MMC Los Banos or MMC Modesto)', and 'Item(s) Requested w/ Reason & Date of Service: New Born Summary'. A 'Send Task' button is highlighted with a red arrow at the bottom left of the form.

## Tasking a GLOBE Patient

6. This will attach the globe patient's DOB & address to the template. Send the Task. This is the beginning of a documented communication in a request of records without a patient chart.

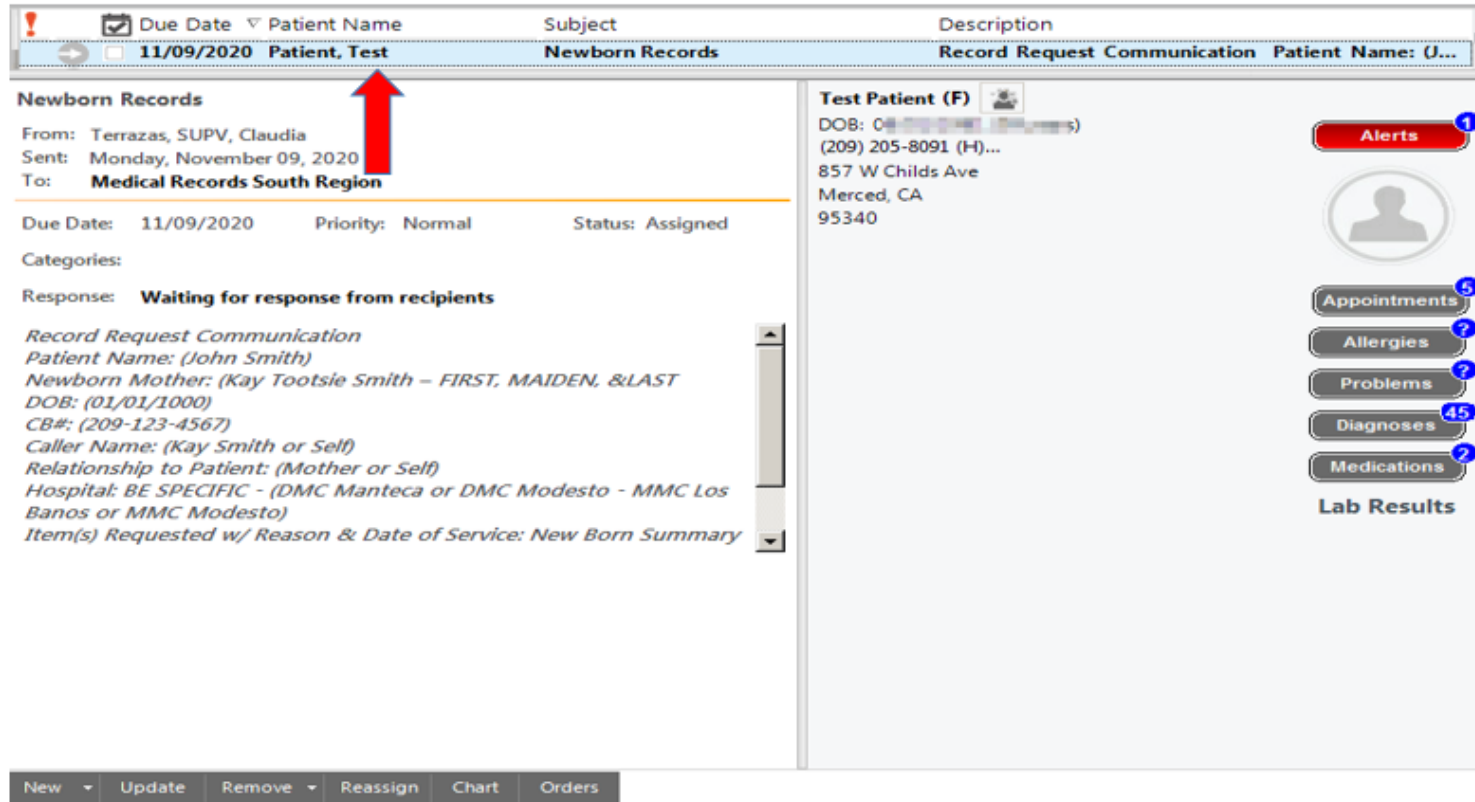


The screenshot displays a medical software interface with the following components:

- Left Panel:** "Today's Appointments (40)" with a list of appointment cards.
- Center Panel:** "Newborn Records" header. Metadata includes: "From: Terrazas, SUPV, Claudia", "Sent: Monday, November 09, 2020", and "To: Medical Records South Region". Fields for "Due Date" (11/09/2020), "Priority" (Normal), and "Status" (Pending) are visible. A "Categories" dropdown is present. A scrollable text box contains: "CB#: (209-123-4567)", "Caller Name: (Kay Smith or Self)", "Relationship to Patient: (Mother or Self)", "Hospital: BE SPECIFIC - (DMC Manteca or DMC Modesto - MMC Los Banos, or MMC Modesto)", "Item(s) Requested w/ Reason & Date of Service: New Born Summary from DOB 01/01/1000", and "Records Due by/for: Appt. scheduled 11/12/2018 with Dr. Test in North Merced".
- Right Panel:** "Test Patient (F)" header. Fields include: "DOB: (01/01/1000)", "(209) 205-8091 (H)...", "857 W Childs Ave", "Merced, CA", "95340", and "Re: Document" (None).
- Bottom Right:** A vertical menu with buttons for "Alerts" (1), "Appointments" (5), "Allergies" (?), "Problems" (?), "Diagnoses" (45), "Medications" (2), and "Lab Results".
- Bottom Left:** A "Send Task" button with a red arrow pointing to it.

## Tasking a GLOBE Patient

7. The tasking communication will be sent to the appropriate Medical Records Region Inbox to be processed by the HIR staff. As you see, the patient's full name will now appear attached to the communication. This will assist in continued communication until the patient's chart is created.



The screenshot displays a medical records system interface. At the top, a table lists communication items with columns for Due Date, Patient Name, Subject, and Description. The selected item is dated 11/09/2020, titled 'Patient, Test', with the subject 'Newborn Records' and description 'Record Request Communication Patient Name: (J...'. A red arrow points to the 'Patient, Test' text in the table.

Below the table, the communication details are shown:

- From:** Terrazas, SUPV, Claudia
- Sent:** Monday, November 09, 2020
- To:** **Medical Records South Region**

Additional details include:

- Due Date:** 11/09/2020
- Priority:** Normal
- Status:** Assigned
- Categories:**
- Response:** **Waiting for response from recipients**

The main body of the communication contains the following text:

*Record Request Communication*  
*Patient Name: (John Smith)*  
*Newborn Mother: (Kay Tootsie Smith – FIRST, MAIDEN, & LAST*  
*DOB: (01/01/1000)*  
*CB#: (209-123-4567)*  
*Caller Name: (Kay Smith or Self)*  
*Relationship to Patient: (Mother or Self)*  
*Hospital: BE SPECIFIC - (DMC Manteca or DMC Modesto - MMC Los Banos or MMC Modesto)*  
*Item(s) Requested w/ Reason & Date of Service: New Born Summary*

On the right side, a patient profile for 'Test Patient (F)' is visible, including DOB, phone number, and address. A sidebar contains navigation buttons for Alerts (1), Appointments (5), Allergies (?), Problems (?), Diagnoses (45), Medications (?), and Lab Results.

At the bottom, a toolbar includes buttons for New, Update, Remove, Reassign, Chart, and Orders.



## Tasking a GLOBE Patient

8. It is very important to include any and all information when requesting records, especially with newborns. The different hospitals in our area each register the newborn in a different way. The baby could be registered under multiple names. Also, Hospitals have multiple locations. Listing just DMC does not provide enough information as the different hospitals have different portals to access records. The more information provided, the better chance Medical Records can find the appropriate documents.

Please use the below templates – **Replace all Red information with patient specific information**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• <b>For New Born Record Requests</b></li> <li>• Record Request Communication</li> <li>• Patient Name: <b>(John Smith)</b></li> <li>• Newborn Mother: <b>(Kay Tootsie Smith – FIRST, MAIDEN, &amp;LAST Name is very important as baby may have a different last name)</b></li> <li>• DOB: <b>(01/01/1000)</b></li> <li>• CB#: <b>(209-123-4567)</b></li> <li>• Caller Name: <b>(Nurse Kay Smith or Mother)</b></li> <li>• Relationship to Patient: <b>(Mother)</b></li> <li>• Hospital: BE SPECIFIC - <b>(DMC Manteca or DMC Modesto - MMC Los Banos or MMC Modesto)</b></li> <li>• Item(s) Requested w/ Reason &amp; Date of Service: <b>New Born Summary from DOB 01/01/1000</b></li> <li>• Records Due by/for: <b>Appt. scheduled 11/12/2018 with Dr. Test in North Merced</b></li> </ul> | <ul style="list-style-type: none"> <li>• <b>For New Patient ER or Hospital Admission Follow Up Record Requests</b></li> <li>• Record Request Communication</li> <li>• Patient Name: <b>(John Smith)</b></li> <li>• DOB: <b>(01/01/1000)</b></li> <li>• CB#: <b>(209-123-4567)</b></li> <li>• Caller Name: <b>(Nurse Kay Smith or Self)</b></li> <li>• Relationship to Patient: <b>(Mother or Self)</b></li> <li>• Hospital: BE SPECIFIC - <b>(DMC Manteca or DMC Modesto - MMC Los Banos or MMC Modesto)</b></li> <li>• Date of ER Visit: <b>(01/01/1000) Only if not admitted to hospital</b></li> <li>• Admission Date: <b>(01/01/1000 only if admitted to hospital)</b></li> <li>• Discharge Date: <b>(01/01/1000 only if admitted to hospital)</b></li> <li>• Records Due by/for: <b>Appt. scheduled 11/12/2018 with Dr. Test in North Merced</b></li> </ul> |
|---|--|







