

# Order Worksheet

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Version 20.14

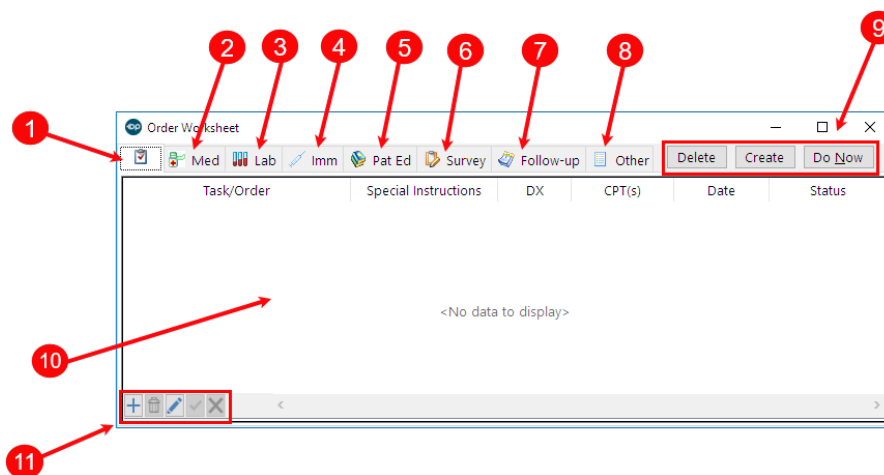


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

## About Order Worksheet

**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Tasks tab > New Order button**

The Order Worksheet assigns tasks to departments within the Practice. Tasks can be associated to an Encounter or Well Visit template and automatically populate the Order Worksheet. Tasks can also be assigned through each of the tabs located on the Order Worksheet.



## Order Worksheet Map

Number	Section	Description
1	Order Worksheet Summary tab	The Order Worksheet Summary tab displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status. The function button options in this tab are Delete, Create, and Do Now.
2	Med tab	The Medication Entry tab allows you to create, add, refill, print, send and review prescriptions from this location. The function button options in this tab are Add RX, Create, and Do Now. The Show EFR checkbox is also displayed in this tab.
3	Lab tab	The Diagnostic Test and Lab entry tab is where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition from this location. The function button options in this tab are New, Create, and Do Now.
4	Imm tab	The Immunizations tab allows you to create and modify tasks for immunization. The function button options in this tab are Imms (which accesses the patient's Immunization Chart), Create, and Do Now. Recommended vaccines are indicated at the bottom of the Order Worksheet when in this tab.

5	Pat Ed tab	The Patient Education tab allows you to create, modify, and view resource/handout orders. The function button options in this tab are Create and Do Now.
6	Survey tab	The Survey tab allows you to create and modify Survey orders, and administer surveys. The function button options in this tab are Create and Do Now. Do Now opens the Survey window.
7	Follow-up Task tab	The Follow-Up Tasks tab allows you to create and modify follow-up orders, and select to schedule a follow-up. The function button options in this tab are Create and Do Now. Do Now opens the Calendar window.
8	Other Tasks tab	The Other Tasks tab is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks. The function button options in this tab are Referral (which opens the Referral/Care Transaction Details window), Create, and Do Now. A list of Task Types can be found below.
9	Function buttons	The function buttons differ depending on which tab of the Order Worksheet you're viewing. Refer to the numbered sections above to see what actions are available from each tab.
10	Order Worksheet grid	The Order Worksheet grid displays the orders in the selected tab.
11	Action buttons	The action buttons are used to add, delete, edit, save, and cancel new entries into the Order Worksheet window.

## Task Type Table

Selection	Description
A/R Followup	Task will launch the Claims section of the Patient Chart.
Account	Task will launch the Summary section of the Patient Chart.
Asthma Plan	Task will launch the Asthma Plan wizard.
Checklist	Task will create a checklist.
Consent	Task will open the Consents and Directives window.
Dev Graphical	Task will launch the Graphic Developmental Milestones.
Dev Narrative	Task will launch the Narrative Developmental Milestones.
Flow Chart	Task will open the Preventive Care Flow Sheet.
History	Task will open the History window.
Insurance	Task will open the Insurance section of the Patient Chart.
Message	Task will open a message window.
Records Request	Task will open the Event Chronology window.
Referral Letter	Task will open the Referral/Care Transitions Detail window. Entry of a patient referral is complete from this window.
Register	Task will open the Basic Information section of the Patient Chart.
Report	Task will open the Event Chronology window.
Scanning	Task will open the Input Scanned Items window.
Schedule	Task will open the Calendar.
Vital Sign	Task will open the Vital Signs and Growth Measurements window.

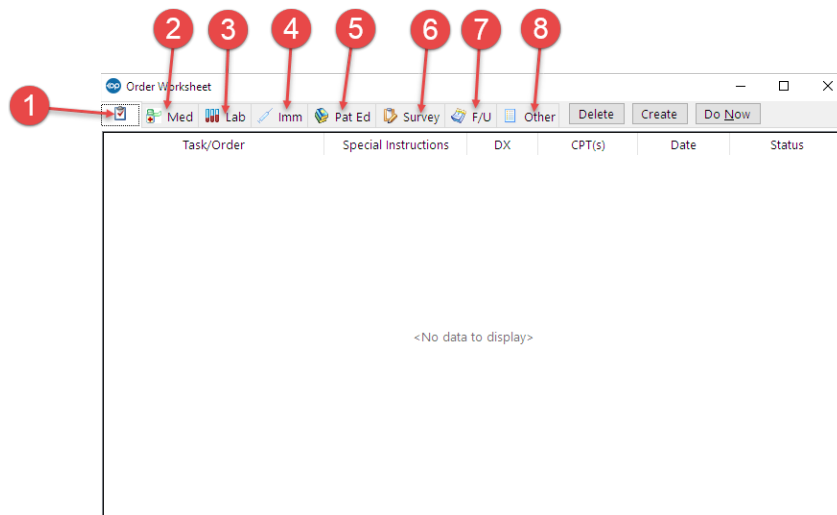


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1	Order Worksheet Summary tab	The Order Worksheet Summary tab displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status
2	Medication Entry tab	The Medication Entry tab allows you to create, add, refill, print, send and review prescriptions from this location.
3	Diagnostic Test and Lab Entry tab	The Diagnostic Test and Lab entry tab is where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition from this location.
4	Immunizations tab	The immunizations tab allows you to create and modify tasks for immunizations in this location. Clicking the needle icon accesses the patient's immunization chart. Recommended vaccines are indicated at the bottom of the order worksheet.
5	Patient Education tab	The Patient education tab allows you to create, modify, and view resource/handout orders from this location.
6	Survey tab	The Survey tab allows you to create, modify, and administer survey orders from this

		location. Clicking the Do Now button opens the Survey window.
7	Follow up (F/U) Task tab	The Follow Up Tasks tab allows you to create and modify follow-up orders, and select to schedule a follow-up from this location. Clicking the Do Now button opens the Schedule and Practice Workflow window.
8	Other Tasks tab	The Other Tasks tab is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks from this location. Task Types are listed below. Clicking the Add Referral Letter opens the Referral/Care Transaction Details window.

## Task Type Table