

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Orders and Workflow Other Tasks Tab

Last Modified on 12/09/2019 3:30 pm EST

Version 14.19

## Overview

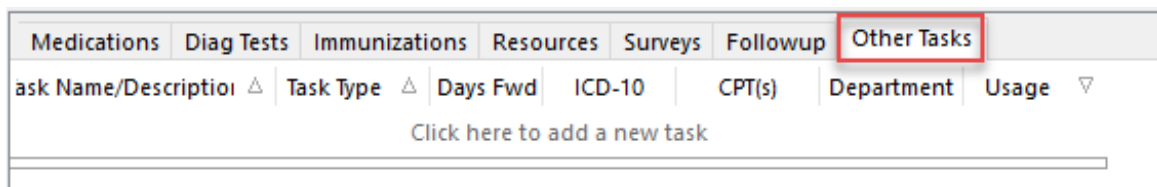
**Path: Clinical tab > Encounter Templates button or Well Visit Templates button > (select template) > Add or Edit button > Orders/Workflow button > Other Tasks tab**

This section of template design demonstrates the edit or addition of other tasks associated to a template. These are tasks that *can not* be added through any of the other tabs associated to template design, such as an ear wash.

- [Add Other Tasks](#)
- [Edit Other Tasks](#)
- [Delete Other Tasks](#)

## Adding Other Tasks

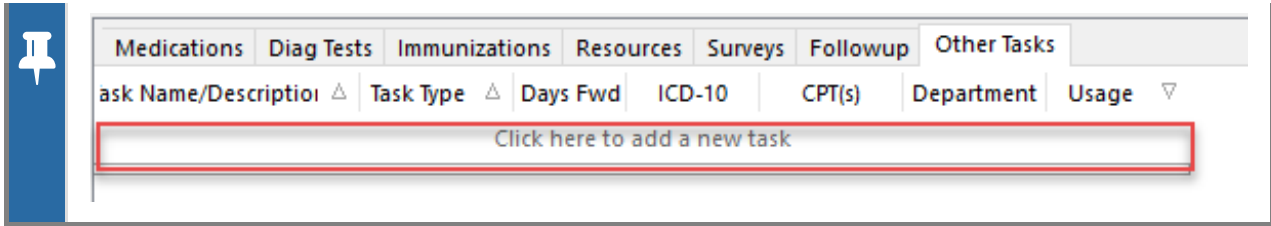
1. Follow the path above to locate the Other Tasks tab.
2. Click the **Other Tasks** tab.




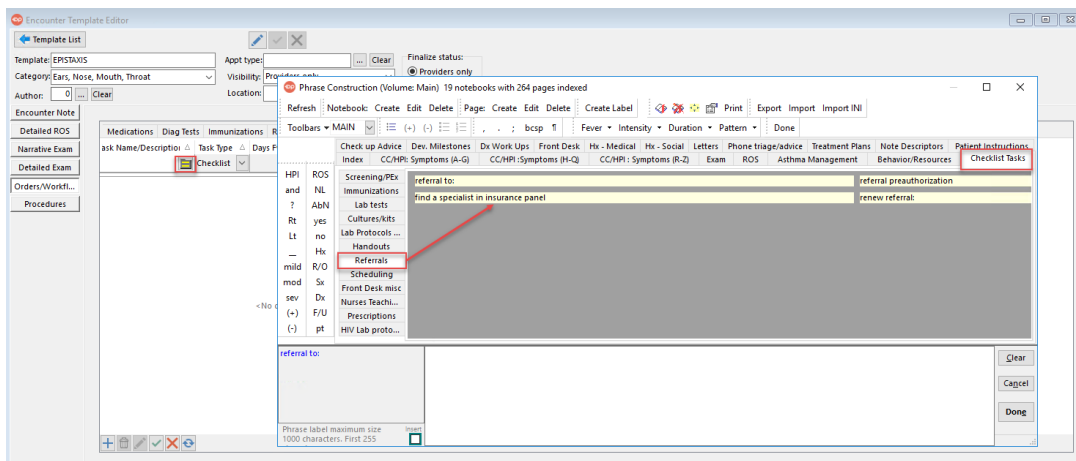
| Task Name/Description        | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage |
|------------------------------|-----------|----------|--------|--------|------------|-------|
| Click here to add a new task |           |          |        |        |            |       |

3. Click the **Add** button  .

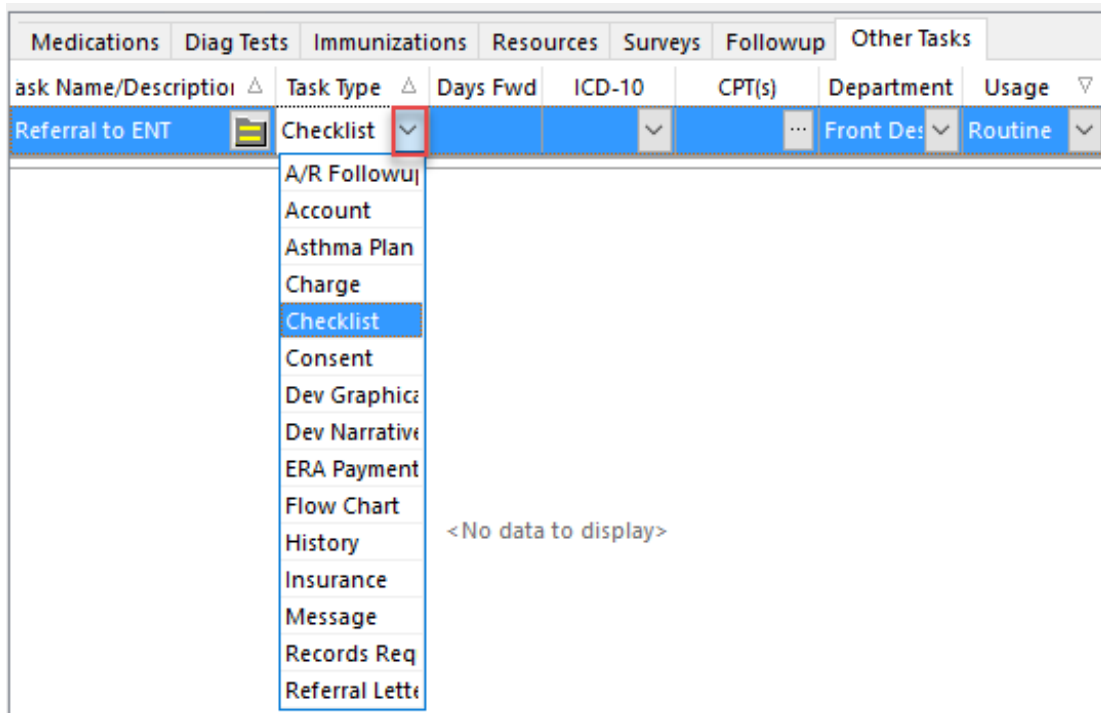
**Note:** You may also click the add new record field.



4. Click the **phrase construction** button  in the Task Name/Description field.
5. Select a **phrase**. If there is no Phrase to select, enter a **Phrase** in the Task Name/Description field. For more information on [Phrase Construction](#).



6. Select a **Task Type** from the drop-down menu.



| Task Type       | Description  |
|-----------------|--|
| A/R Followup    | Claims tab of the Patient Account  |
| Account         | Overview tab of the Patient Account  |
| Asthma Plan     | Starts the Asthma Action Plan Wizard   |
| Checklist       | Information task that does not take you to a specific area of Office Practicum |
| Consent         | Opens the Patient Consents   |
| Dev Graphical   | Graphic of Developmental Milestones  |
| Dev Narrative   | Narrative of Developmental Milestones  |
| Flow Chart      | Opens the Care Plan for the patient  |
| History         | Patient History tab  |
| Insurance       | Insurance tab of the Patient Register  |
| Message         | Opens a new message  |
| Records Request | Opens Event Chronology   |
| Referral Letter | A new referral opens for input   |
| Register        | Patient tab of the Patient Register  |
| Report          | Opens Event Chronology   |
| Scanning        | The scan window will open  |
| Schedule        | The calendar window will open  |
| Vital Sign      | Patient Vitals and Growth window opens   |

7. If the task is for a future date, enter the **Number** in the Days Fwd field (optional).

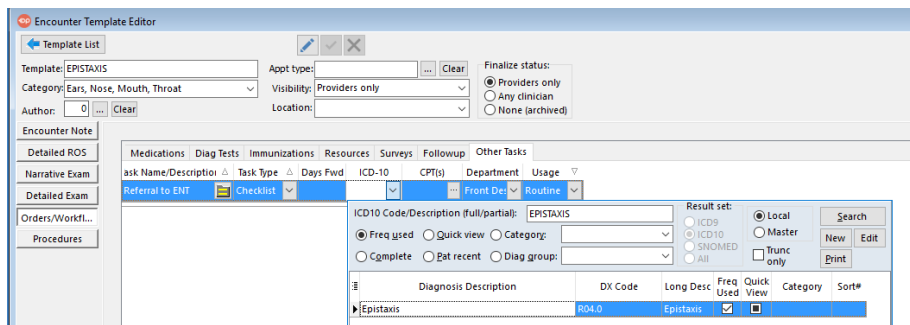
Medications | Diag Tests | Immunizations | Resources | Surveys | Followup | Other Tasks

ask Name/Description | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage

Referral to ENT | Checklist | [ ] | [ ] | [ ] | Front De: | Routine

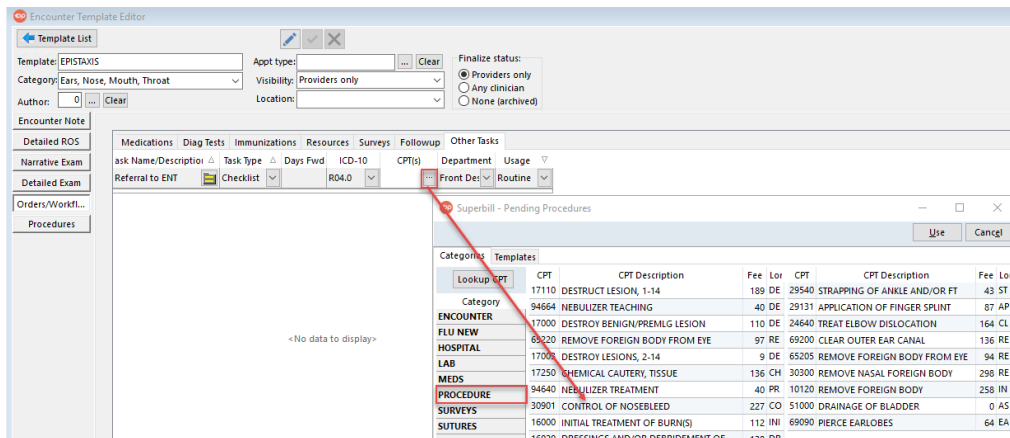
8. Select a **Diagnosis Code** from the drop-down menu. The diagnosis search window is displayed (optional).

- Enter a **Code** or **Description** and click the **Search** button.
- **Double-click** - OR -**highlight** and click the **Select** button.



9. Click the **ellipse** button **...** in the CPT field and select a **Procedure Code**. The procedure window is displayed (optional, only enter if billing).

- Select a **Category** from the drop-down menu.
- Highlight the **Procedure Code** and click the **Use** button.



**Note:** If the CPT code is not found in the categories, click the **Lookup CPT** button.

10. Select a **Department** from the drop-down menu.

| Task Name/Description | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage   |
|-----------------------|-----------|----------|--------|--------|------------|---------|
| Referral to ENT       | Checklist |          | R04.0  | 30901  | Front Desk | Routine |

Providers  
**Front Desk**  
 Nursing  
 Billing  
 Patient  
 Referrals  
 Lab

11. Select a **Usage** from the drop-down menu.

| Task Name/Description | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage   |
|-----------------------|-----------|----------|--------|--------|------------|---------|
| Referral to ENT       | Checklist |          | R04.0  | 30901  | Front Desk | Routine |

Alternate  
**Routine**  
 Standing

| Usage     | Definition  |
|-----------|---|
| Alternate | Shows the item in the task window. An alternate item needs to be selected at time of charting.  |
| Routine   | Shows the item in the task window with a checkmark already selected in the add field. A routine item is selected for task submission at time of charting. |
| Standing  | A standing order is submitted as a task to the selected department when the template is used at time of charting.   |

12. Click the **Save** button  .

## Editing Other Tasks

1. Follow the path above to locate the Other Tasks tab.
2. Click the **Other Tasks** tab.

| Task Name/Description        | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage |
|------------------------------|-----------|----------|--------|--------|------------|-------|
| Click here to add a new task |           |          |        |        |            |       |

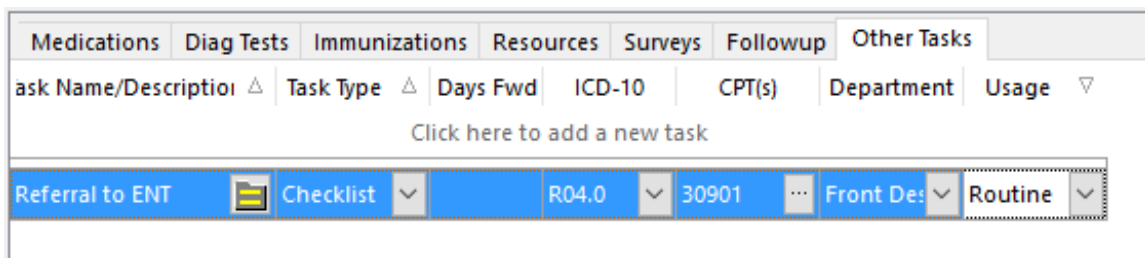
3. Click to highlight the follow up to edit.

- Click the **Phrase Construction** button in the Task Name/Description field or enter the task.
- Select a **Type** from the Task Type drop-down menu.
- Enter the **number of days forward** the task becomes active in the Days Fwd field.
- Select a **Diagnosis Code** from the DX drop-down menu.
- Select a **Procedure Code** from the CPT drop-down menu.
- Select a **Department** from the drop-down menu.
- Select a **Usage** from the drop-down menu.


4. Click the **Save** button.

## Deleting Other Tasks

1. Follow the path above to locate the Other Tasks tab.
2. Click the **Other Tasks** tab.



| Task Name/Description | Task Type | Days Fwd | ICD-10 | CPT(s) | Department | Usage   |
|-----------------------|-----------|----------|--------|--------|------------|---------|
| Referral to ENT       | Checklist |          | R04.0  | 30901  | Front De   | Routine |

3. Highlight the **Task** to delete.
4. Click the **Delete** button  .

Version 14.10

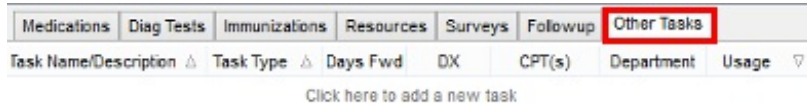
## Overview

This section of template design demonstrates the edit or addition of other tasks associated to a template. These are tasks that *can not* be added through any of the other tabs associated to template design, such as an ear wash.

- [Add Other Tasks](#)
- [Edit Other Tasks](#)
- [Delete Other Tasks](#)

## Add Other Tasks

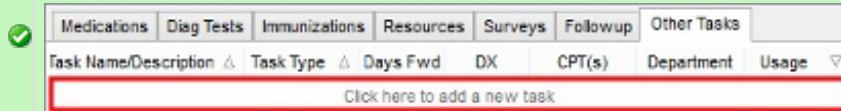
1. Review the Other Tasks tab.
  - Click the **Other Tasks** tab.



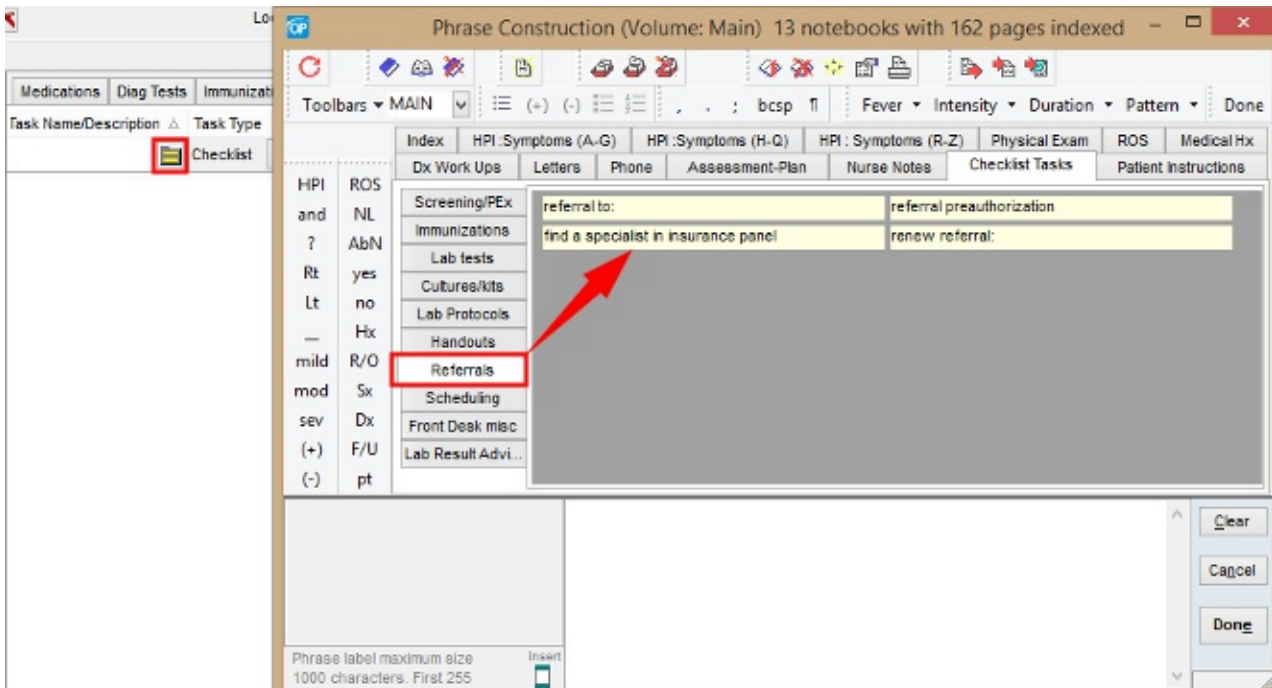
### Encounter Template Editor: Other Tasks Tab

2. Click the **Insert Record** button  .

**Note:** You may also click into the add new record field.



3. Click the **phrase construction** button  in the Task Name/Description field.
4. Select a **phrase**.

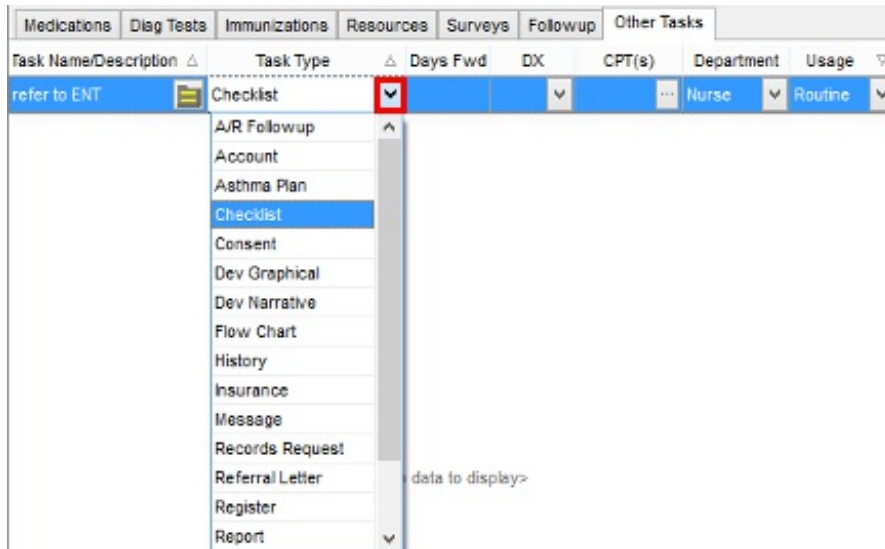


### Encounter Template Editor: Phrase Construction

**Note:** If there is no phrase to select for the Task, enter it in the Task Name/Description field.

[Click the link for more information on Phrase Construction.](#)

5. Select a **Task Type** from the drop-down menu



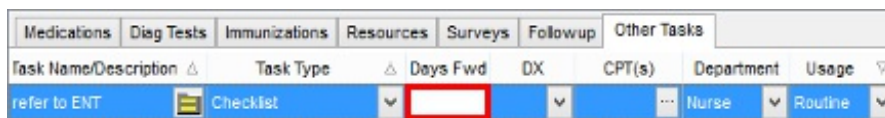
**Encounter Template Editor: Task Type List**

| Task Type       | Description  |
|-----------------|--|
| A/R Followup    | Claims tab of the Patient Account  |
| Account         | Overview tab of the Patient Account  |
| Asthma Plan     | Starts the Asthma Action Plan Wizard   |
| Checklist       | Information task that does not take you to a specific area of Office Practicum |
| Consent         | Opens the Patient Consents   |
| Dev Graphical   | Graphic of Developmental Milestones  |
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| Flow Chart      | Opens the Care Plan for the patient  |
| History         | Patient History tab  |
| Insurance       | Insurance tab of the Patient Register  |
| Message         | Opens a new message  |
| Records Request | Opens Event Chronology   |



| Task Type  | Description                            |
|------------|--|
| Register   | A new referral opens for input         |
| Report     | Patient tab of the Patient Register    |
| Scanning   | Opens Event Chronology                 |
| Schedule   | The scan window will open              |
| Vital Sign | The calendar window will open          |
|            | Patient Vitals and Growth window opens |

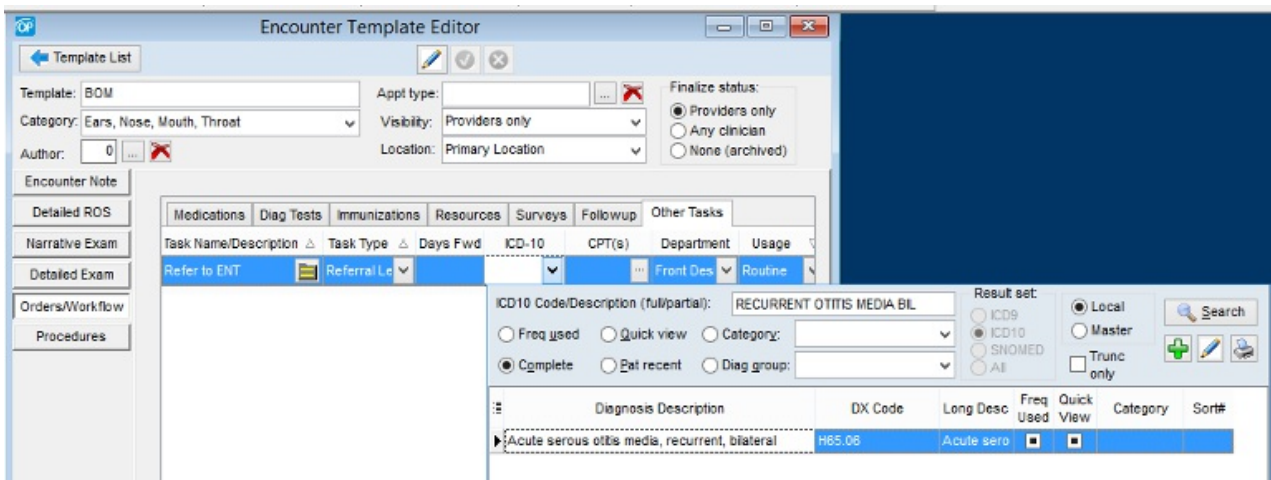
6. If the Task is for a future date, enter the **number** in the Days Fwd field (optional).



### Encounter Template Editor: Days Forward

7. Select a **Diagnosis Code** from the drop-down arrow. The diagnosis search window is displayed (optional).

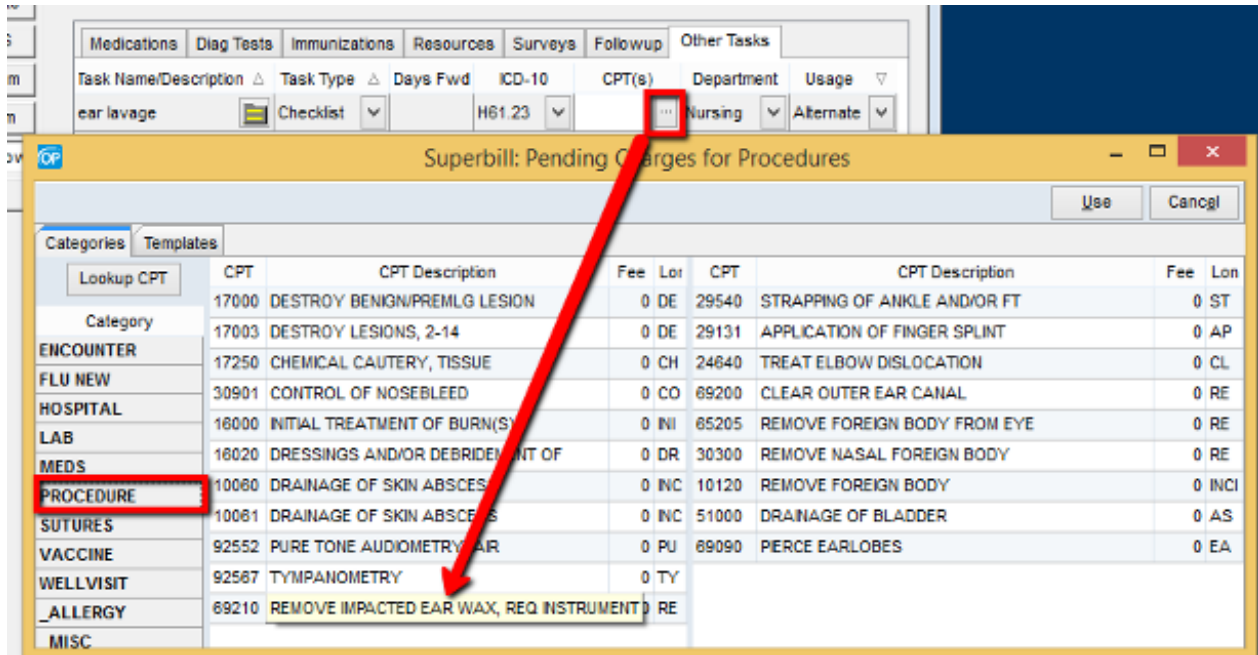
- Enter a **Code** or **Description** and click the **Search** button.
- **Double-click** - OR - **highlight** and click the **Select** button.




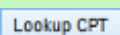
### Encounter Template Editor: DX Code

8. Click the **ellipse** button **...** in the CPT field and select a procedure code. The procedure window displays (optional, only enter if billing).

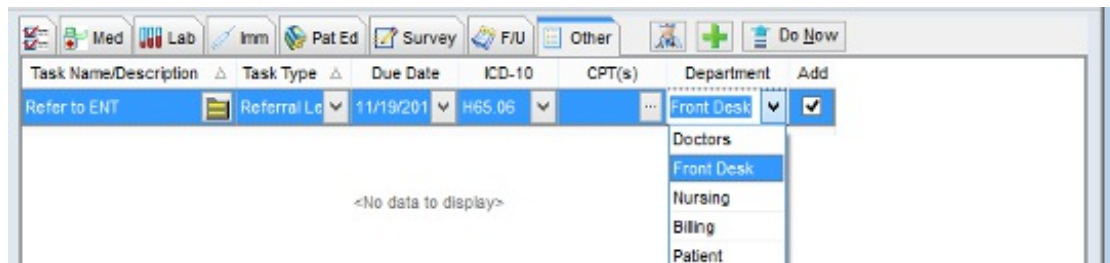
- Select a category.
- Highlight the procedure code and click the **Use** button.



### Encounter Template Editor: CPT

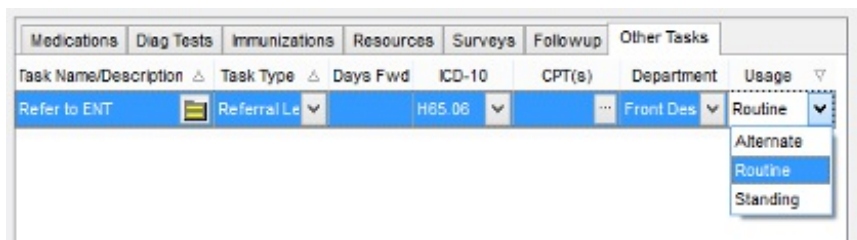
 **Note:** If the CPT code is not found in the categories, click the **Lookup CPT** button 

9. Select a **Department** from the drop-down menu.



### Encounter Template Editor: Department

10. Select a **Usage** from the drop-down arrow.



### Encounter Template Editor: Usage

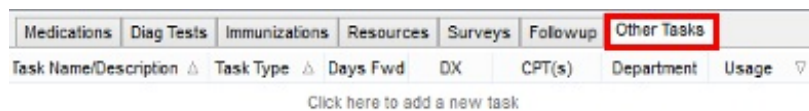
| Usage     | Definition  |
|-----------|---|
| Alternate | Shows the item in the task window. An alternate item needs to be selected at time of charting.  |
| Routine   | Shows the item in the task window with a checkmark already selected in the add box. A routine item is selected for task submission at time of charting. |
| Standing  | A standing order is submitted as a task to the selected department when the template is used at time of charting.                                       |

11. Click the **Post edit** button  .

## Editing Other Tasks

1. Review the Other Tasks tab.

- Click the **Other Tasks** tab.



### Encounter Template Editor: Other Tasks Tab

2. Click to highlight the follow up to edit.

- Click the **Phrase Construction** button in the Task Name/Description field or enter the task.
- Select a **Type** from the Task Type drop-down menu.
- Enter the **number of days forward** the task becomes active in the Days Fwd field.
- Select a **Diagnosis Code** from the DX drop-down menu.
- Select a **Procedure Code** from the CPT drop-down menu.
- Select a **Department** from the drop-down menu.
- Select a **Usage** from the drop-down menu.

3. Click the **Post edit** button  .

## Deleting Other Tasks

1. Review the Other tasks tab.


- Click the **Other Tasks** tab.

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|                         |             |               |           |         |            |                    |
|-------------------------|-------------|---------------|-----------|---------|------------|--------------------|
| Medications             | Diag Tests  | Immunizations | Resources | Surveys | Followup   | <b>Other Tasks</b> |
| Task Name/Description ▲ | Task Type ▲ | Days Fwd      | DX        | CPT(s)  | Department | Usage ▼            |

Click here to add a new task

### Encounter Template Editor: Other Tasks Tab

2. Click to highlight the other Task to delete.
3. Click the **Delete record** button  .