

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.

View Outstanding Tasks

Last Modified on 01/02/2020 3:27 pm EST

Version 14.19

Path: Clinical, Practice Management, or Billing tab > Schedule button

Overview

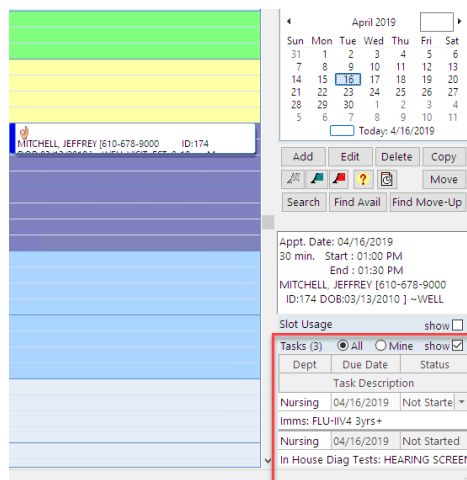
In this article, you will learn how to view and complete outstanding tasks.

Viewing and Completing Tasks from Calendar

1. Select the **Calendar** radio button.
2. Select a **Patient** on the calendar. Tasks are displayed in the bottom right panel.



Note: If tasks are not displayed, confirm the Show checkbox is selected. In addition, you may show tasks for departments assigned to your user profile by selecting the Mine radio button or any department selecting the All radio button.



April 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today: 4/16/2019

MITCHELL, JEFFREY [610-678-9000 ID:174]

Appt. Date: 04/16/2019
30 min. Start: 01:00 PM
End: 01:30 PM
MITCHELL, JEFFREY [610-678-9000 ID:174 DOB:03/13/2010] ~WELL

Slot Usage show

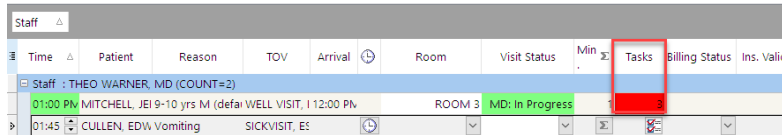
Tasks (3) All Mine show

Dept	Due Date	Status	Task Description
Nursing	04/16/2019	[Not Started]	
Imms:	FLU-HIV4 3yrs+		
Nursing	04/16/2019	[Not Started]	
In House Diag Tests:	HEARING SCREE		

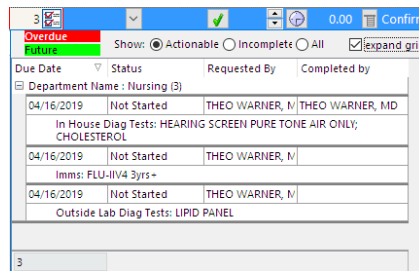
3. Double-click a **Task** to complete the process. The Tasks update and the Task is removed from the list.

Viewing and Completing Tasks from Tracking

1. Select the **Tracking** radio button.
2. Click the **Task** button in the Tasks column. The Task window is displayed.



Staff	Time	Patient	Reason	TOV	Arrival	Room	Visit Status	Min	Tasks	Billing Status	Ins. Valid
THEO WARNER, MD (COUNT=2)	01:00 PM	MITCHELL, JEI 9-10 yrs M (defal	WELL VISIT, I	12:00 PM		ROOM 3	MD: In Progress				
	01:45	CULLEN, EDW. Vomiting	SICKVISIT, ES								



Due Date	Status	Requested By	Completed by
Department Name : Nursing (3)			
04/16/2019	Not Started	THEO WARNER, M	THEO WARNER, MD
In House Diag Tests: HEARING SCREEN PURE TONE AIR ONLY; CHOLESTEROL			
04/16/2019	Not Started	THEO WARNER, M	
Imms: FLU-IV4 3yrs+			
04/16/2019	Not Started	THEO WARNER, M	
Outside Lab Diag Tests: LIPID PANEL			

3. Double-click a **Task** to complete the process. The Tasks update and the Task is removed from the list.

Version 14.10

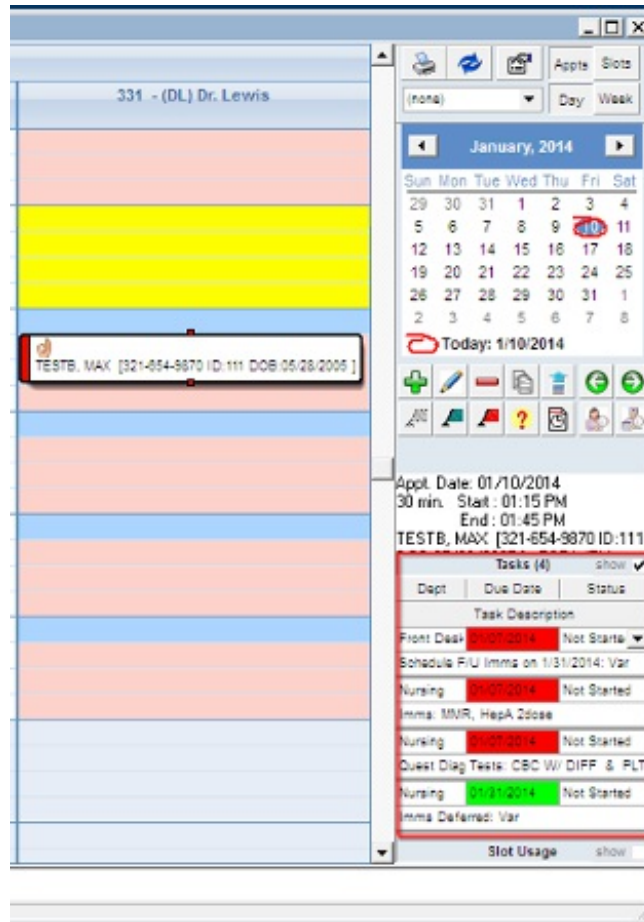
Path: Smart Toolbar > Schedule button

Overview

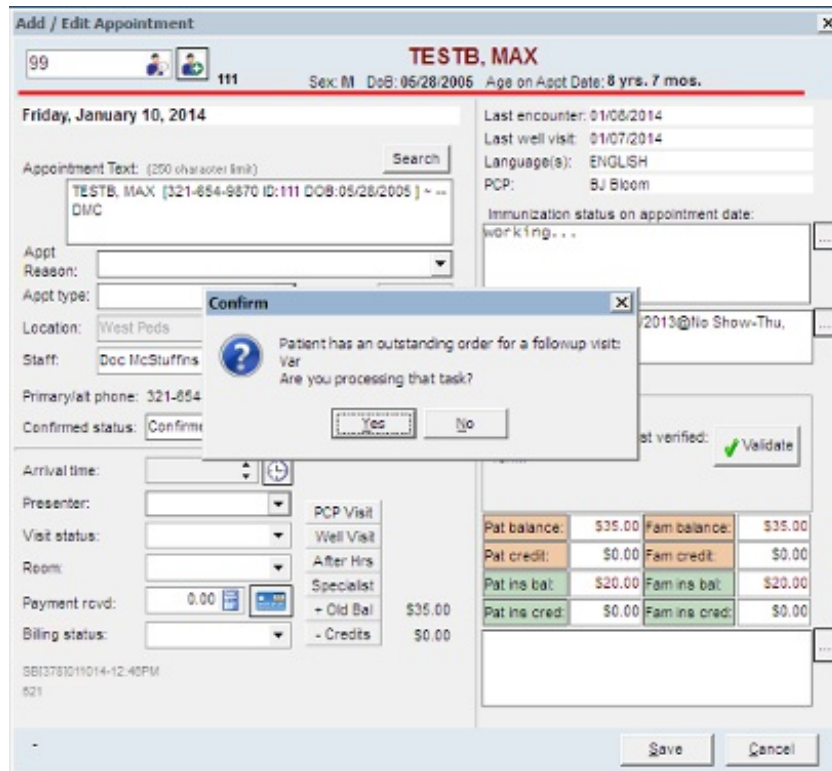
You will learn how to view and complete outstanding tasks.

Viewing and Completing Tasks from Calendar

1. Left-click the **Appointment** to view the patient's task. At the bottom right hand of the screen, all Tasks for the patient are displayed. *This example will only focus on Front Desk tasks.*



2. Double-click the **Task** to complete it. If you are scheduling an appointment, do not double-click on the task, go to the available date and double-click to make the appointment. A Confirmation pop-up box is displayed to confirm that you want to schedule the Task.
3. Click the **Yes** button.



Add / Edit Appointment

99 111 **TESTB, MAX**
 Sex: M DoB: 05/28/2005 Age on Appt Date: 8 yrs. 7 mos.

Friday, January 10, 2014

Appointment Text: (250 character limit) Search
 TESTB, MAX (321-654-9870 ID:111 DOB:05/28/2005) ~ --
 DMC

Appt Reason: Last encounter: 01/08/2014
 Last well visit: 01/07/2014
 Language(s): ENGLISH
 PCP: BJ Bloom
 Immunization status on appointment date:
 working...

Appt type: 2013@No Show-Thru, ...

Location: West Pods Primary/alt phone: 321-654

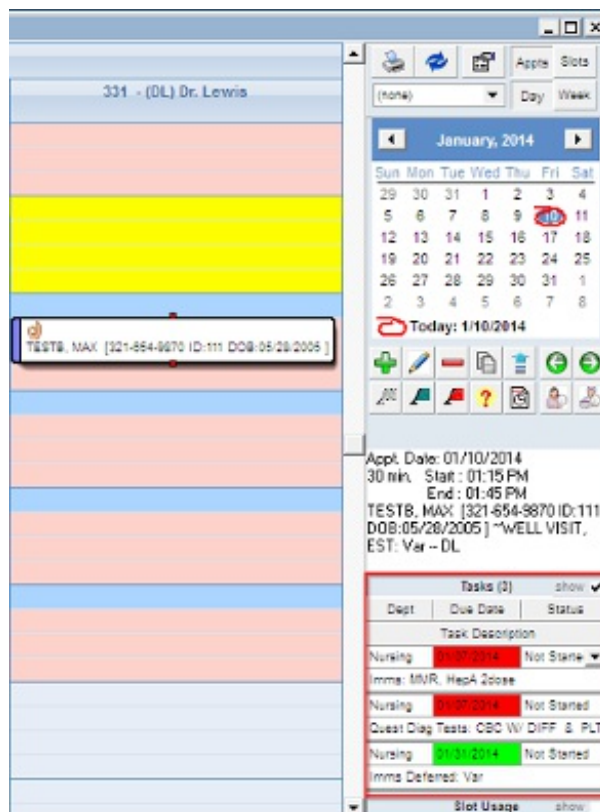
Staff: Doc McStuffins Confirmed status: Confirmed Yes No Validate

Arrival time: Pat balance: \$35.00 Fam balance: \$35.00
 Presenter: Pat credit: \$0.00 Fam credit: \$0.00
 Visit status: Pat ins bal: \$20.00 Fam ins bal: \$20.00
 Room: Pat ins cred: \$0.00 Fam ins cred: \$0.00
 Payment rcd: 0.00 + Old Bal \$35.00
 Billing status: - Credits \$0.00

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 621

Save Cancel

The outstanding Tasks update and are removed from the Task list.



331 - (DL) Dr. Lewis

Appnt Slots
 (none) Day Week

January, 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 1/10/2014


Appt. Date: 01/10/2014
 30 min. Start: 01:15 PM
 End: 01:45 PM
 TESTB, MAX (321-654-9870 ID:111
 DOB:05/28/2005) ~WELL VISIT,
 EST: Var - DL

Tasks (2)		
Dept	Due Date	Status
Task Description		
Nursing	01/10/2014	Not Started
Imms: MVR, HepA 2dose		
Nursing	01/10/2014	Not Started
Quest Diag Tests: CBC W/ DIFF & PLT		
Nursing	01/10/2014	Not Started
Imms Deferred: Var		

Slot Usage show

Viewing and Completing Tasks from Tracking

1. Click the **Tracking** tab  **Tracking** .

- In the Check List Column, click the **Task** button  for the patient. The Red number, indicates how many tasks are outstanding for the selected patient. The Checklist window is displayed.

Time	Patient	Visit Status	Min.	CheckList	Billing Status	Ins. Valid	CheckOut	CoPaid	Confirm Status
Staff : DD9 Demo Doctor (COUNT=2)									
10:20 AM	TEST, LLOYD			16				0.00	Unconfirmed
11:10 AM	TEST, PAM	Checked Out		3			11:05 AM	25.00	Unconfirmed

Due Date	Status	Requested By	Completed by
Department Name : Front Desk (1)			
08/16/2016	Not Started	Jenna Test	
Sched f/u: PPD Reading (48-72 hours)			

- Double-click the **Task** to select it. You are directed to the location where the Task is to be completed. Once the Task is finished, it is removed from the task list of the specified patient.