JOB AID: TASKING A NOTE TO ANOTHER PROVIDER

CREATED BY HEALTH AND CLINICAL IT LEARNING AND DEVELOPMENT FOR

Creighton MEDICAL ASSOCIATES
To task a **finalized** note to another provider for review, do the following:

1. Go to the Chart Viewer
2. Left click once on the note to be tasked

**EITHER**

3. Click on the New Task button

**OR**

4. Right click on the selected note
5. Select New
6. Select Task
The Task Detail window will open. The following sections of the Task Detail need to be completed.

7. Select the provider who needs to review the note.
   a. Make sure USER is selected
   b. DO NOT task to clinical or front desk staff directly, these individuals are part of teams for your clinic
   c. To change the provider click on ALL
   d. Search by last name
   e. Select the provider by clicking once on the name
   f. Click OK in the bottom right corner
8. **Select the Review Note task.**

a. DO NOT select the GO TO NOTE (this opens the note in edit form and could cause another sign amended note task for you)

b. DO NOT select the NOTIFY PROVIDER OF NOTE (goes to clinical staff).
9. If necessary, change priority from routine to either ASAP or URGENT

10. If necessary, enter a comment to the provider

11. Click OK to send the task
The provider receiving the task will see it on either their Document tab or as a task.

**Task List View**

- Comments are at the top (top arrow)
- Scroll up or down to review the note
- Click **NEW TASK** if you need to send a task to clinical staff or front desk staff to schedule an appointment (remember, all staff other than providers are part of a team and should not receive individual tasks)
- Click **DONE** to complete the task.
- The document tab will automatically take you to next document and/or patient on the list.