

How To:

Manage Patient Tasks

Patient tasks can be managed either from the provider dashboard or directly within a patient's profile. The dashboard gives each provider a personalized view of their assigned tasks, while the patient profile offers a complete, patient-centric view of all pending actions across providers

What's Inside

- Provider Dashboard
- Patient Landing Page
- Reassigning a Pending Prescription
- Task Restrictions

Provider Dashboard

The Dashboard provides a centralized view of all tasks assigned to the logged-in provider. From here, providers can take action quickly and efficiently—such as editing prescriptions, responding to renewal or refill requests, and managing other patient-related tasks. This streamlined view helps providers stay organized and ensures that important actions are completed without needing to navigate away from the main workspace.

Key actions from the Dashboard:

- Click on the **three-dot menu** next to a pending prescription and select **Edit** to make changes.
- Select tasks from the list and click the action button (**e.g., Approve & Send, Process**) to proceed.
- Click on a **patient's name** to navigate directly to their **patient landing page** for a full, patient-centric view of tasks.

Tasks (21) Novus Internal Testing... On Behalf of:

Pending Prescriptions (13) RxChange Requests (2) Transmission Errors (6)

9 of these Potential Prescriptions will cause drug/allergy interactions.

<input type="checkbox"/>	Patient Name	Prescription	Quantities	Pharmacy	Entered On	Status		
<input checked="" type="checkbox"/>	Glenora Trebbiano Female 03/28/1994 31 Y MRN: -	Adderall Oral Tablet 30 MG Schedule II Substitutions Allowed 30 day supply SIG: Take 1 tablet orally, daily for 30 days. Effective Date: 08/22/2025	Dispense: 30 Refills: 0	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	Aug 22, 2025 8:29 AM MDT	Awaiting Approval Prior Auth. Required	:	×
<input type="checkbox"/>	Glenora Trebbiano Female 03/28/1994 31 Y MRN: -	Adderall Oral Tablet 30 MG Schedule II Substitutions Allowed 30 day supply SIG: Take 1 tablet orally, daily for 30 days. Effective Date: 08/22/2025	Dispense: 30 Refills: 0	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	Aug 22, 2025 7:52 AM MDT	Awaiting Approval Prior Auth. Required	:	×
<input type="checkbox"/>	Glenora Trebbiano Female 03/28/1994 31 Y MRN: -	Xanax Oral Tablet 0.5 MG Schedule IV Substitutions Allowed 30 day supply SIG: Take 1 tablet orally, daily for 30 days.	Dispense: 30 Refills: 0	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	Aug 20, 2025 8:52 AM MDT	Awaiting Approval Prior Auth. Required	:	×

1 Selected Require Prior Auth.
[Initiate Prior Auth. for Selected](#)

[Print Prescription](#) [APPROVE & SEND](#)

Patient Landing Page

The Patient Landing Page provides a comprehensive, patient-centric view of all information and tasks related to a specific individual. From this page, providers can review pending prescriptions, renewal requests, and other outstanding tasks—**regardless of which provider originally created them**. This centralized view ensures that prescribers have a complete picture of a patient’s tasks and care needs, making it easier to review and manage everything in one place.

Key points to note:

- Providers can **take over pending prescriptions** created by another provider, becoming the main prescriber and assuming full responsibility.
- Providers **cannot take action on other task types** (such as RxChange or Refill requests) if they were initiated by a different provider.

Tasks (49)

Pending Prescriptions (28) RxChange Requests (2) Pharmacy Refill Requests (1) Transmission Errors (18)

⚠️ 14 of these Potential Prescriptions will cause drug/allergy interactions.

<input type="checkbox"/>	Prescription	Quantities	Pharmacy	Entered By	Entered On	Status		
<input checked="" type="checkbox"/>	Motrin IB Oral Tablet 200 MG Substitutions Allowed 1 day supply SIG: Take 1 tablet orally, 1 time only for 1 day. Effective Date: 03/19/2025 ⚠️ Major Drug/Allergy Interaction(s)	Dispense: 1 Refills: 1	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	zachary prescriber View Details	Mar 20, 2025 9:36 AM MDT	Awaiting Approval	:	×
<input type="checkbox"/>	Motrin IB Oral Tablet 200 MG Substitutions Allowed 1 day supply SIG: Take 1 tablet orally, 1 time only for 1 day. Effective Date: 02/20/2025 ⚠️ Major Drug/Allergy Interaction(s)	Dispense: 1 Refills: 1	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	zachary prescriber View Details	Feb 21, 2025 8:16 AM MST	Awaiting Approval	:	×

test

[Print Prescription](#) **APPROVE & SEND**

Reassigning a Pending Prescription

If a provider approves and sends a pending prescription that was originally created by another prescriber, the system will prompt them to reassign the prescription. To proceed, they must **select the checkbox** to confirm responsibility as the main prescriber and then click **Send** to finalize the action.

Actions Before Sending

Reassignment Actions Needed

One or more of the selected prescriptions were entered by another prescriber. To proceed with 'Approve and Send,' please confirm that you want to reassign them to yourself as the primary prescriber.

Prescription Name & Dosage	Patient Name	Prescriber
Motrin IB Oral Tablet 200 MG, Capsules	Zac ,Sewall	zachary ,prescriber

I Confirm to reassign prescriptions to myself as the main prescriber

CANCEL **SEND**

Task Restrictions

If you attempt to take action on another provider's tasks—other than pending prescriptions—you will not be able to proceed. Instead, a message will appear indicating that you do not have the necessary permissions to complete the action.

RxChange Request

[RxChange Request](#)

Patient Information: Baxter Dallesandro


DOB: 07/21/2010 Address: 315 Filmore Ave Unit 13C Pocatello, ID 83201
Gender: Male Height: 53 inch
Phone: (502)654-3215 Weight: 66 lb

Request Type: Prior Authorization

Notes From Pharmacy:
Payer Name: PBMX
Initial Prescriber: jason prescriber

Prescribed Medication

Prescription	Quantities	Days Supply	Directions
Lisinopril Oral Tablet 10 MG Tablets Substitutions Allowed Effective Date: 06/06/2025	Dispense: 30 Refills: 1	30	Take 1 tablet orally, daily for 30 days.

 You currently don't have the necessary permissions to process this request based on prescriber restrictions. This request will be available as read-only. Select "Skip this Request" to proceed to the next one.

[CLOSE](#)