Using Task Assignment Override to Route PelEX Encounter Notifications

Last Updated: August 2025

PelEX provides participants with Encounter Notification Services, which can be done via Secure Direct Mail or integrated into your EMR by sending Encounter Notifications directly to you. EHR integration requires some additional interface development with your EHR vendor, but the real issue is determining how to make it most useful for pre-visit planning and post-discharge follow-up.

For Athena users, there is a helpful tool called **Task Assignment Override** that practices can use to route PelEX Encounter Notifications to a designated location in the EMR for later review.

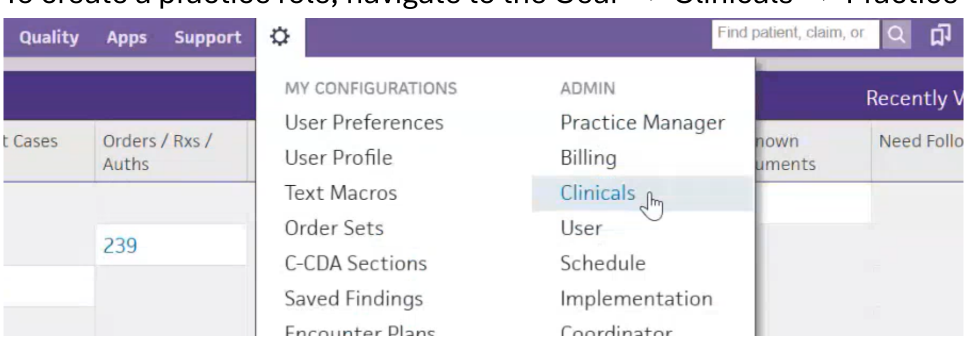
What is Task Assignment Override?

Task Assignment Override (TAO) acts as the "air traffic control" for inbound messages into Athena. It controls how to route messages to specified buckets or boxes where staff can access them. TAO uses certain criteria to process messages and to know where to send messages: by certain users, by certain providers, and by certain types of statuses. A list of those can be found within the O-Help Article for Task Assignment Overrides (linked **here** – note that an athenahealth login is required to access).

How to Create a Practice Role for PelEX

Practice roles are created to receive alerts through task assignments. This allows a group of assigned users to manage tasks assigned to the practice role. Once setup, one can use TAO to route messages to the designated practice role.

1. To create a practice role, navigate to the Gear **-->** Clinicals **-->** Practice Roles



Credit to Access Health Louisiana for process discussion and Ignite Health Solutions for instructions.

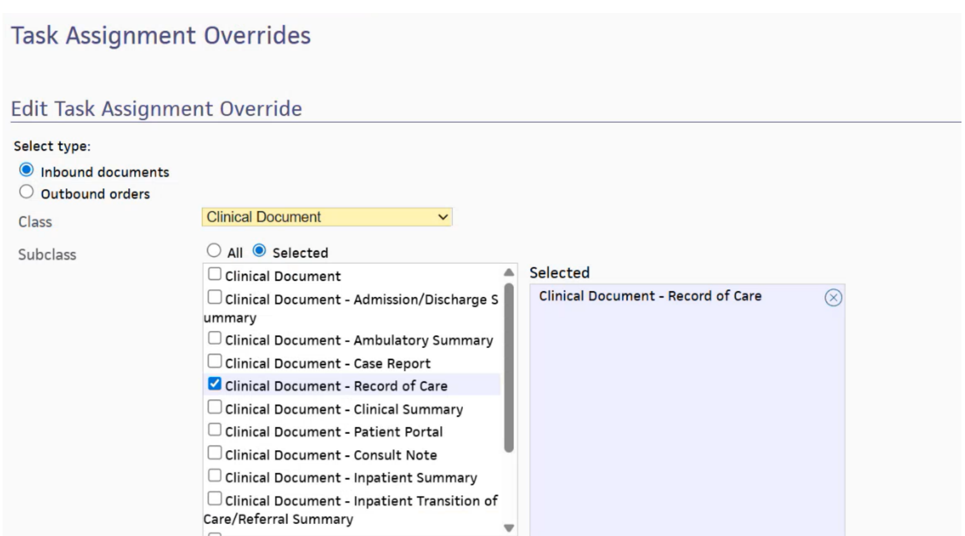
2. Add the name “PelEX” and select whether this practice role should be visible to all departments or (a) certain one(s). You can also add users to this practice role to assist in an overall task count for those end-users.

How to Create a Task Assignment Override

NOTE: It may take 30-60 minutes for the new practice role to populate in the “Assignee” field when configuring a TAO.

1. Navigate to the Gear --> Clinicals --> Task Assignment Overrides (scroll down the sidebar until the Other section)

2. Select whether this task assignment override applies to inbound documents or outbound orders.
    a. We are configuring where inbound Encounter Notifications go, so we are selecting “Inbound documents”.
3. Select the class of the order.
    a. Select “Clinical Documents”
4. Select a subclass for the order.
    a. Select “Clinical Document – Record of Care”.



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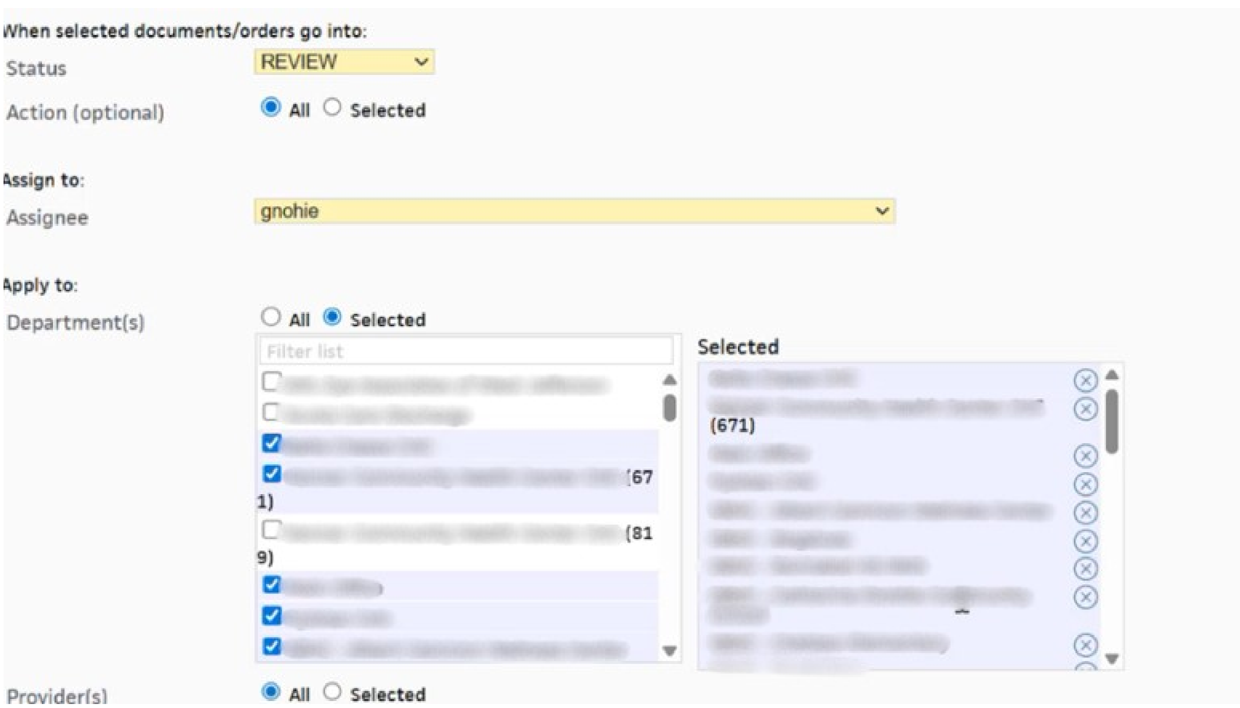
5. Status – select which status this routing will apply to.
    a. Select the “REVIEW” status.
6. Action – typically not needed, is used for granular workflows.
    a. Select “All”.
7. Assignee – where you will assign the task assignment override to.
    a. Select the practice role “PelEX” that was just created.
8. Departments
    a. You may select “All” or you may choose “Selected” and pick specific departments based on whom you wish to receive alerts for.
9. Providers
    a. Select “All”.
10. Ordering
    a. Task Assignment Overrides go by the lowest number as priority. We recommend setting the value to “100”.



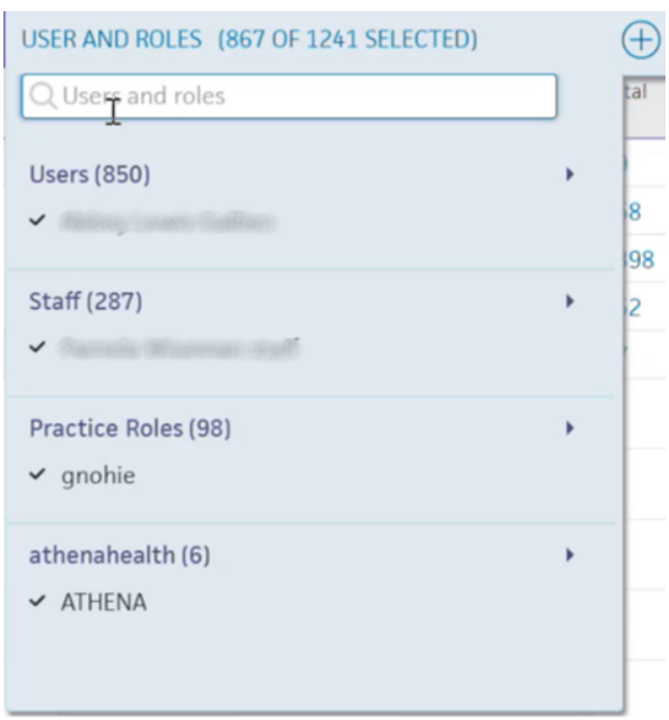
Once complete, you may return to the TAO table to see the new TAO populate (like below).

ID	Document Class / Subclass	Ordering	Action	Next Status	Department	Provider	Order Type	Order Genus	Assigned to
843	• Clinical Document - Record of Care	100	All	REVIEW	• [illegible] CHC • [illegible] Community Health Center CHC (671) • Main Office • [illegible] • [illegible] more	All			gnohie

How to add a bucket to Clinical Inbox

Once you've created the TAO, you may add it to a Clinical Inbox to monitor the tasks.

1. Click the "+" symbol in the top right corner
2. Select the "HIE" practice role to add it to your Clinical Inbox



Credit to Access Health Louisiana for process discussion and [Ignite Health Solutions] for instructions.

You should see the new TAO appear in the clinical inbox and the clinical documents can be found by clicking on the number in the “Clinical Documents” column.

Assigned To	Encounters	Appointment Requests	Patient Cases	Orders / Rxs / Auths	Lab / Imaging	Clinical Documents
			1			
					6	
	1					
			1			
			1			
	1		4	28	22	2
gnohie						17968

Tip: use CTRL + F to quickly jump to the TAO in the list

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