From the Office of Clinical Informatics

PowerChart Ambulatory
Managing the Multi-Patient Task List

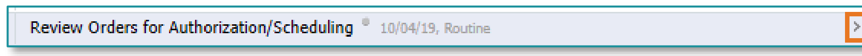
October 14, 2019

This flyer describes how to manage tasks on the Multi-Patient Task List for immediate and future action.

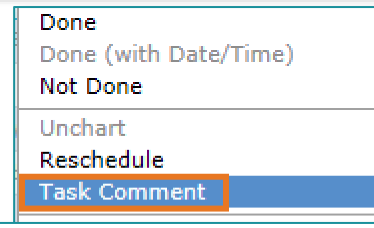
Tasks for Immediate Action

For tasks that need immediate action for scheduling/coordination at the next availability:

➢ **From the Multi-Patient Task List View:**

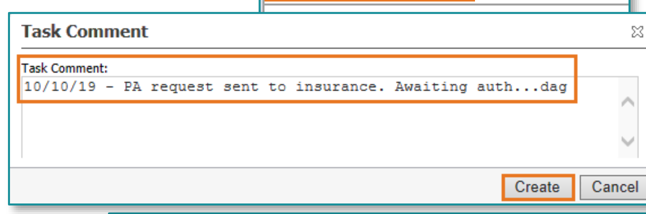


STEP 1: Identify what the test is for and what is requested by selecting the **carrot** in the Task/Order column.



STEP 2: For tasks awaiting a response from a third party (prior auth, scheduling etc.), indicate a **task comment** with that information:

- **Right-click** the task.
- Select **Task Comment**.
- Free text the comment in the task comment box including the date and your initials.
- Click **Create.**



STEP 3: Task Comments can be viewed by selecting the carrot in the Task/Order column.

STEP 4: Once all information is gathered/appointment/obtained, **complete** the task from the **Single Patient Task List** as per usual.

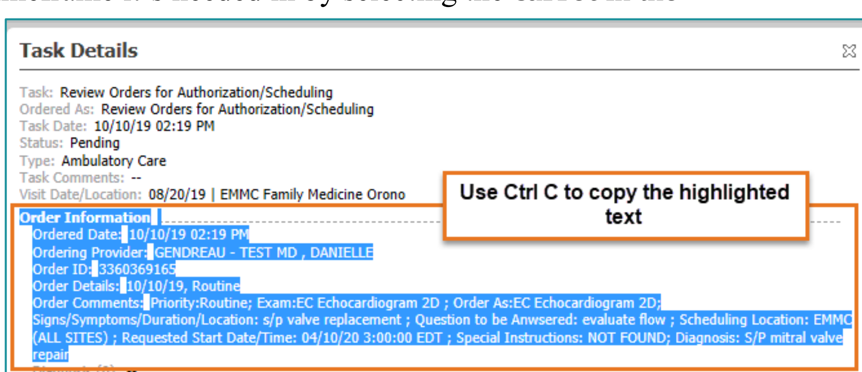
Tasks for Future Action

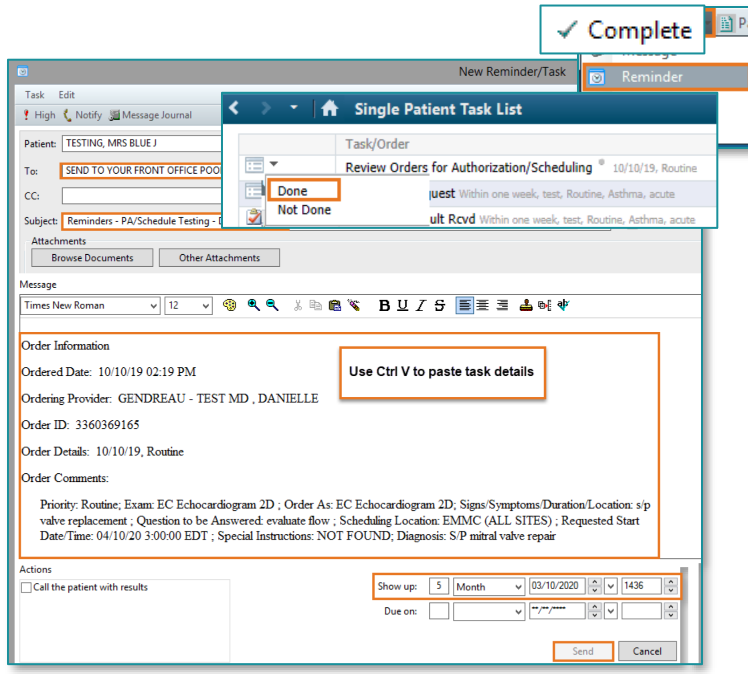
For tasks that don't need scheduling/coordination for 3 months, or further out (i.e. echocardiogram in 6 months, Follow-up in 1 year etc.):

STEP 1: Identify what the test is for and the timeframe it's needed in by selecting the **carrot** in the Task/Order column.

STEP 2: Highlight the task details and use **Ctrl C to copy**.

STEP 3: Navigate to the Communicate button and select the dropdown arrow.





STEP 4: Select Reminder.

STEP 5: Use **Ctrl V to paste** the copied task text into the body of the reminder.

STEP 6: In the **To:** field, insert your front office pool.

STEP 7: In the **Subject:** field, add what the reminder is for.

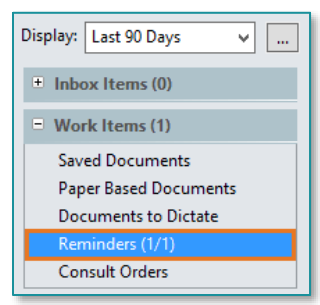
STEP 8: In the **Show Up:** field, select the time-frame in which you want to be reminded to commence the work.

STEP 9: Click **Send**.

STEP 10: Add a task comment stating reminder created with the date and your initials. The task should not be completed at this time and will remain on the task list, though will fall out of view after the default 2 weeks.

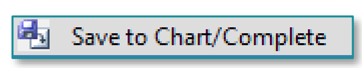
NOTE: **The task will be available for completion on the SPTL at the indicated future date.**

Managing the Reminder and Task



STEP 1: The reminder will appear on the date you indicated for it to show up on in the Message Center Pool under **Reminders.**

STEP 2: Double-click the message and work the task as needed (i.e. Prior Authorization, Scheduling, etc.)



STEP 3: Document in the body of the reminder as needed to indicate that the task is completed and select the **Save to Chart/Complete** button.

STEP 4: If no documentation is needed, simply click the **Complete** button in the tool bar.

STEP 5: Navigate to the patient's chart, **Single Patient Task List (SPTL).**

STEP 6: Complete the task as per usual workflow.