This Quick Reference Guide (QRG) reviews the process of setting up the MPTL in the retail pharmacy
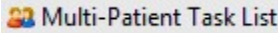
Common Buttons & Icons

🔧	**Wrench** icon
⊞	**Plus** icon
🔍	**Search** icon
➡	**Right Arrow** icon
👥 Multi-Patient Task List	**Multi-Patient Task List** button

Create a Patient List

➢ From the Patient List screen in PowerChart:

STEP 1: Click the **Wrench** icon. The Modify Patient Lists window displays.

STEP 2: Click **New**. The **Patient List Type** window displays.

STEP 3: Click **Location**.

STEP 4: Click **Next.**

STEP 5: Click the **Plus** icon for the **Locations** folder.

STEP 6: Click the Plus icon for your location.

STEP 7: Click the **Plus** icon for **Inpatient and/or Outpatient** .

NOTE: **Any patient that will potentially enroll in the Meds to Beds program needs to be included in your list. In many cases, this includes units in both Inpatient and Outpatient locations.**

STEP 8: Select the check box for each unit in which a patient could participate in the Meds to Beds program.

STEP 9: Enter a list name in the **Enter a name for the list** field.

STEP 10: Click **Next.**

STEP 11: Click **New.** Skip to step 16 if no proxy is needed.

NOTE: **You can add the list to the Patient List screen for staff groups or individual staff members:**

- **To add by Group:**
  a. **Click Group, if not already selected.**
  b. **Click the Group drop-down arrow.**
  c. **Click the appropriate group.**

- **To add by Provider:**

> a. **Click Provider.**
> b. **Click the Search icon. The Provider Selection window opens.**
> c. **Enter the name in the appropriate fields.**
> d. **Click Search.**
> e. **Click the appropriate name.**
> f. **Click OK.**

STEP 12: Click the **Access** drop-down arrow.

STEP 13: Click the appropriate level access.

NOTE: **Full Access allows the person to modify the list and grant proxy to others, Maintain allows the person to simply modify the list, and Read only allows the person to view the list.**

STEP 14: Enter a date and time in the **To Date** and **Time** fields.

NOTE: **The date should be far in the future so that the list does not expire while it's being used.**

STEP 15: Click **Apply**.

STEP 16: Click **Finish**.

STEP 17: Click the list in the **Available lists** section.

STEP 18: Click the **Right Arrow** icon.

STEP 19: Click **OK**. The list should now display on the **Patient List** screen.

Set Up a Multi-Patient Task List

➢ From the Patient List screen:

STEP 1: Click **Multi-Patient Task List**. The Multi-Patient Task List screen displays.

STEP 2: Click the **1. Pending** tab, if not already selected.

STEP 3: Click **Options**.

STEP 4: Click **Task Display**.

STEP 5: Select only the following Status check boxes: **Pending Validation, Overdue, Pending,** and **In Process.**

STEP 6: Select only the following Task Types: **Pharmacy Meds to Beds Consult** and **Pharmacy Meds to Beds Documentation.**

STEP 7: Click **Save**.

STEP 8: Click **OK**. You return to the Multi-Patient Task List screen.

STEP 9: Right-click the **Assigned Tasks** bar.

STEP 10: Click **Customize Patient View**. The Task List Properties window displays.

STEP 11: Select the **Choose a Patient List** check box.

STEP 12: Click the list you created.

STEP 13: Click **Save**.

STEP 14: Click **OK**. The patient list should now display.

STEP 15: Click the **1. All** tab.

STEP 16: Click **Options.**

STEP 17: Click **Task Display** .

STEP 18: Select the only following Status check boxes: **All, Completed, Pending Validation, Overdue, Pending, In Process** , and **Discontinued/Canceled** .

STEP 19: Select the only following Task Types: **Pharmacy Meds to Beds Consult** and **Pharmacy Meds to Beds Documentation** .

STEP 20: Click **Save**.

STEP 21: Click **OK**. You return to the Multi-Patient Task List screen.

STEP 22: Right-click the **Assigned Tasks** bar.

STEP 23: Click **Customize Patient View** . The Task List Properties window displays.

STEP 24: Select the **Choose a Patient List** check box.

STEP 25: Click the list you created.

STEP 26: Click **Save.**

STEP 27: Click the **Time Frames** tab.

STEP 28: Click **Generic Time Frame** .

STEP 29: Enter a future date in the **To Date** field.

NOTE: **Set this far in the future so that the list will not expire quickly.**

STEP 30: Click **OK**. The patient list should now display.