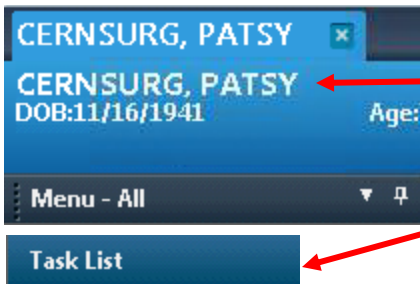


Building Single Patient Task Lists

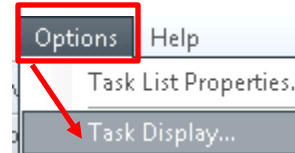


1. Open the patient's chart.

2. Choose Task List.

1. To Set the Task Display

From the Menu bar, select Options, then Task Display.



Viewing: List 1

1. Status box

- Select the statuses you wish to see
- Suggest Pending Validation and Pending
- Some users prefer to select ALL

2. Location Filters

- If needed, choose desired location

3. Time Parameters

- Select All

4. Task Types

- Choose desired tasks

Task Types chosen.

5. Click "Save" and "OK"

Medications

- All Medications
- IVs
- TPN
- Response

Location Filters

- B3
- B3S
- MMC COP
- B4N
- Munson Community Health Center
- B4
- MMC Procedure Room
- B2 Surgery

Task Types

- All
- Scheduling
- Sleep Disorders
- Speech Therapy
- St. Johns Alert
- Surgery
- Therapies OT Notification
- Therapies PT Notification
- Therapies ST Notification
- Transfuse
- UM Chart Review
- Ventilator
- WOC Services

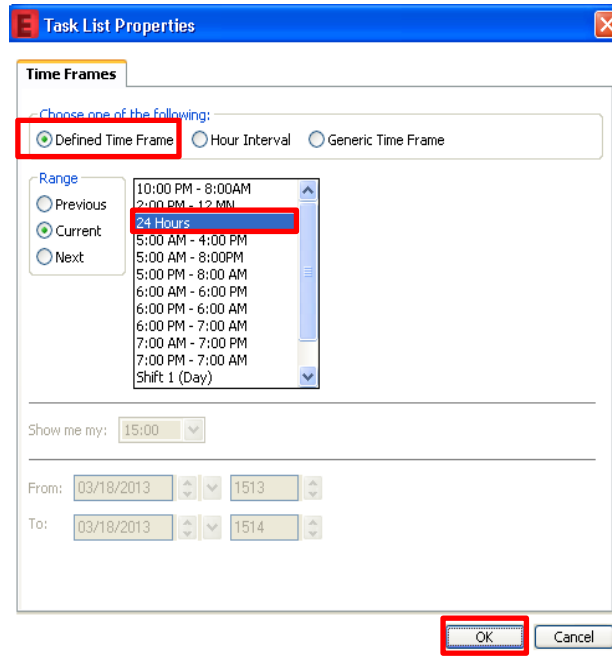
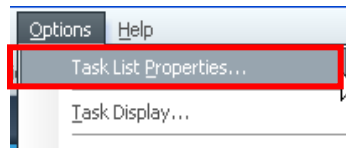
Chosen Task Types: Transfuse

Original Settings

Save OK Cancel

2. To Set Task Properties

- From the Menu bar, select Options
- Click Task List Properties
- Select Defined Time Frame
- Select 24 hours
- Click OK



3. If tasks do not display, click Exit and log back in.

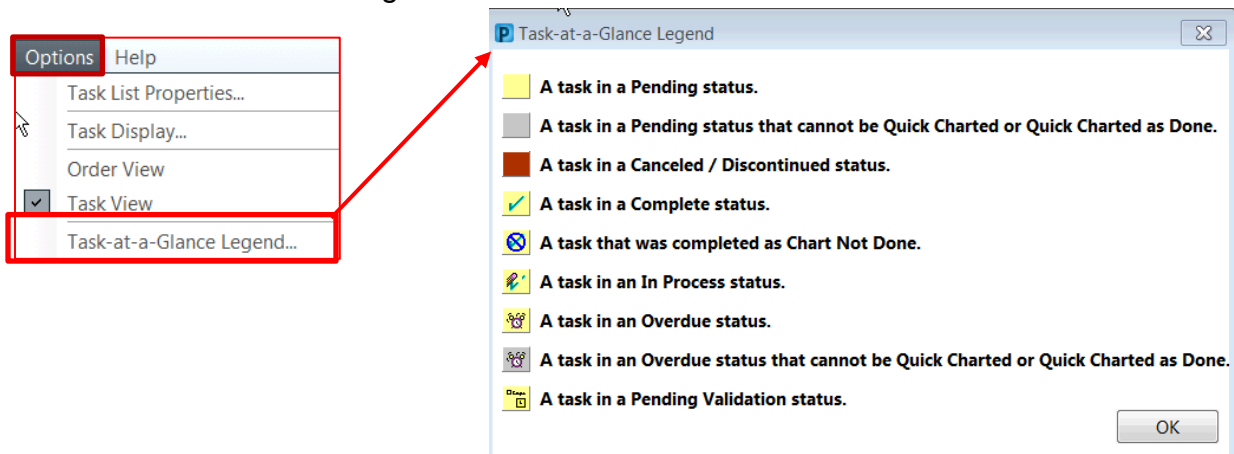
List Usage

- Your task list will display any new tasks (orders) that qualify based on the task type and time criteria selected.
- Any overdue tasks will automatically pull into your task list even if they are from prior to the time criteria you specified.

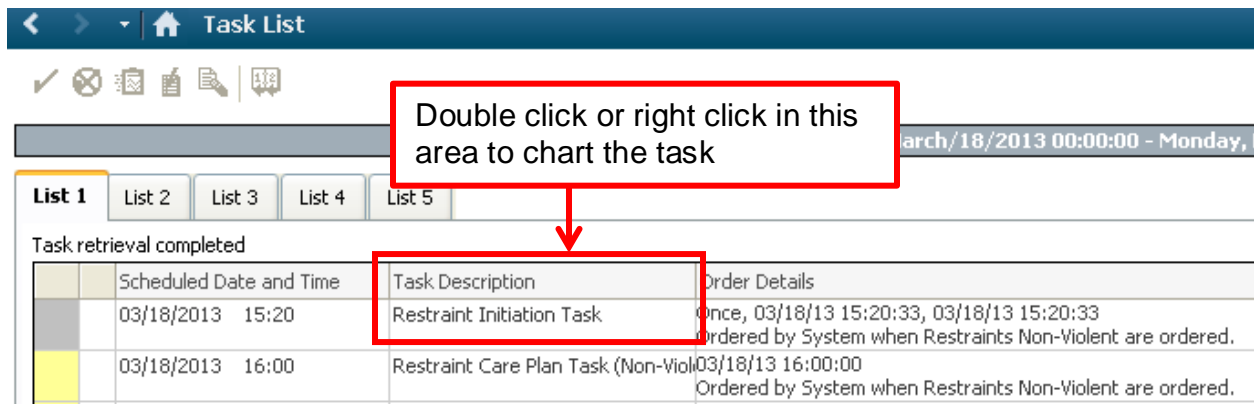
Options -Task at a Glance Legend

1. To View Task - at - a - Glance Legend

- Go to Options
- Click Task-at-a-Glance Legend



Charting Tasks



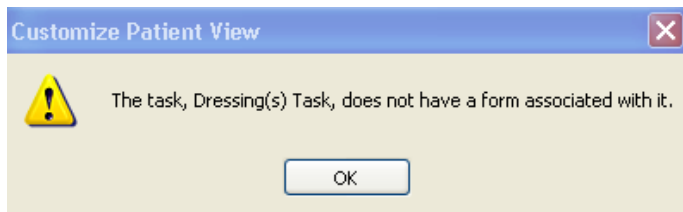
Charting from the Task List:

Some tasks have a form attached. Examples of these are Restraint related tasks. Other tasks do not have forms attached, like the Transfuse Blood Task.

To chart the Task either double-click or right click on the Task Description column:

Double Clicking Task:

- If a form is attached to the task, the form will open for charting.
- If no form is attached to the task the following message will be displayed:



- Click OK and then click on the yellow box at the beginning of the row to 'complete' the task. This is called "Charting Done" which can also be accessed by right clicking on the Task.

Right Click Menu Options:

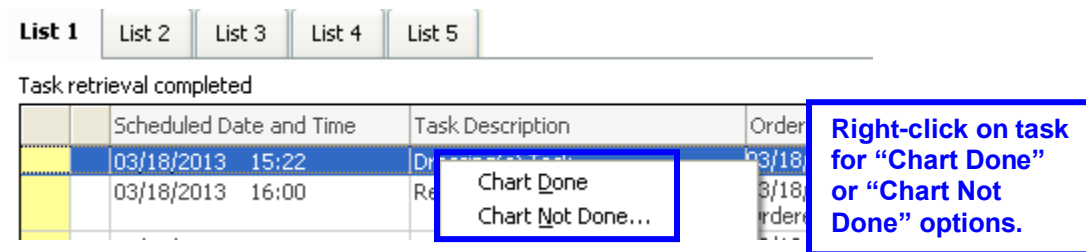


Chart Done: completes the task. After clicking the refresh button the task will no longer display on the task list if you've chosen to not see completed tasks in your display set-up. If you have chosen to see All tasks, then a checkmark will appear in the first column.

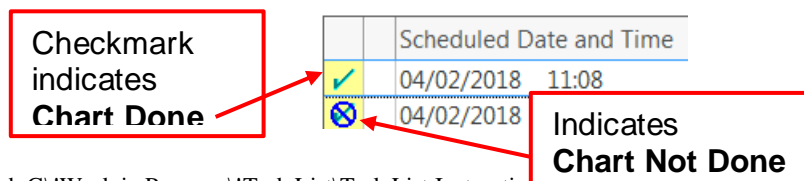


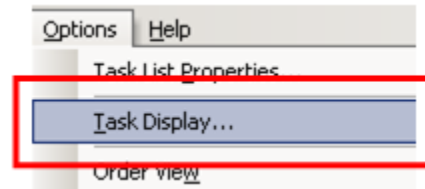
Chart Not Done: removes the task. If the order was entered in error and you will not be completing the task the order can be canceled **or** you can right click on the task and select **Chart Not Done**. Another example of when to use Chart Not Done is if charting was done through Ad Hoc. Charting through Ad Hoc or in IView will not complete the task. In this situation, **Chart Not Done** to get rid of the task.

Correcting Mistakes:

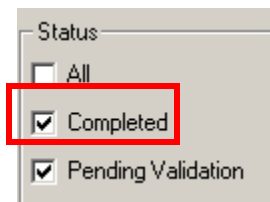
If a task is incorrectly charted done or not done and the task no longer displays on the Task List it can be corrected by locating the task and un-charting it.

- **Locate the task:**

- To do this click Options -> Task List Display



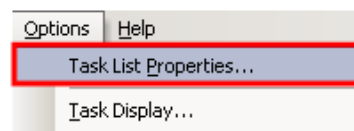
- Mark the Status of Completed, this will again display the Task.



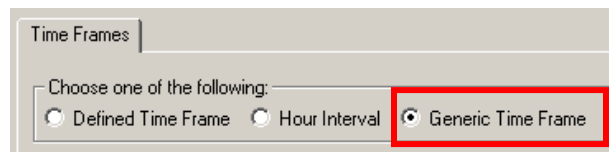
- Click the OK button (not 'save') and when you return to the task list you should see the task that you need to correct (if it was set within the date/time criteria you have defined in your properties setting).
- If you clicked 'save' instead of just OK: go back and uncheck the status of Completed otherwise you will view completed tasks on subsequent logins.

If the mistaken task was originally marked as overdue or was for a different day you will need to:

- Go to Options -> Task List Properties



- Update your timeframe parameters.
 - Select Generic Time Frame if date was 2 days prior



- Then specify timeframe from/to date criteria.



- Change timeframe back to desired time after correcting the mistake.
- **Unchart:** Correct the mistaken task by right clicking on it and selecting the **Unchart** option.

Task retrieval completed

	Scheduled Date and Time	Task Description
✓	04/02/2018 11:08	
	04/02/2018 11:08	
	04/02/2018 11:08	

Chart Done
Chart Not Done...
Quick Chart
Chart Details / Modify...
Unchart..
Ad Hoc Charting...

Misc. Task Info:

- Discontinued tasks turn **RED**.
- Tasks purge 15 days later
- Charting can still occur during the 15 days.
- Completed tasks are also removed from the Orders Matrix.
- Keep Task Lists clean.