

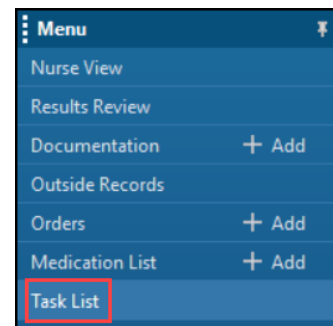
## Task List Overview

Task lists display patient tasks that need to be documented on and completed. There are two display views, Single Patient Task List (SPTL) and Multi-Patient Task Lists (MPTL). SPTL is displayed while in a patient's chart to view all the tasks for this individual patient. MPTL is displayed in the organizer toolbar and displays tasks that are related to a common criterion, for multiple patients at one time.

## Accessing Single Patient Task List (SPTL)

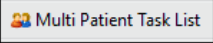
Complete the following steps to access a Single Patient Task List (SPTL).

1. Open the appropriate patient's chart.
2. Select Task List from the dark Menu.



## Accessing Multi-Patient Task List (MPTL)

Complete the following steps to access the Multi Patient Task List (MPTL).

1. Click on the Multi Patient Task List icon  in the organizer toolbar at the top of the screen.

## Task List Toolbar

The following shows the icons and definitions of the buttons available on the Task List toolbar:



**Chart Done:** To Chart the task as Done. (Results are entered as Done.)

Note: A Specimen Collect can have more than one container. If multiple, a container listing window will appear to select the containers to chart done.



**Chart Not Done:** If unable to perform a task, click this button. The status of the task then becomes Complete, and a reason why the task was not done must be entered.

Note: A Specimen Collect can have more than one container. If multiple, a container listing window will appear to select the containers to chart not done.



**Quick Chart:** Complete a task without having to entering information (recommended only for medication tasks). Results are charted at their defaulted values.



**Chart Details:** Opens a charting form and requires input to complete the task and opens modify charting.

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**Unchart:** If a task was started or completed accidentally, Unchart reinitializes the task to a Pending status. Results are marked as In Error on the flowsheet, and any associated charges are credited. This button is dithered for IVs.



**Reschedule This Task:** Opens the Reschedule dialog box so a task can be rescheduled.

Note: A Specimen Collect can have more than one container. If multiple, a container listing window will appear to select the containers to reschedule.

### Task-at-a-Glance (TAG) Bar Overview

The Task-at-a-Glance (TAG) bar is the first, untitled column displayed in the Task List. Icons displayed in the TAG bar allow you to quickly determine the status of a task. The TAG bar also allows you to chart some tasks with a single click.

	Location/Room/Bed	Name	Scheduled Date and Time
	Munson Family Practice Center	*AMBCERNED, ELIJAH 3/2/1948 <i>*Name Alert</i>	12/12/2022 7:00 AM EST
	Munson Family Practice Center	*AMBCERNED, ERIC 2/1/1948 <i>*Name Alert</i>	12/12/2022 7:00 AM EST
	Munson Family Practice Center	*AMBCERNED, ERNEST 4/4/1948 <i>*Name Alert</i>	12/12/2022 7:00 AM EST
	Munson Family Practice Center	*AMBCERNED, ERNEST 4/4/1948 <i>*Name Alert</i>	12/12/2022 11:06 AM EST

### Task-at-a-Glance (TAG) Bar Icons

To view the legend, select Task-at-a-Glance Legend from the Options menu at the top of the screen. Icons and descriptions of the statuses are shown below.

**P** Task-at-a-Glance Legend ✕


- A task in a Pending status.
- A task in a Pending status that cannot be Quick Charted or Quick Charted as Done.
- A task in a Canceled / Discontinued status.
- A task in a Complete status.
- A task that was completed as Chart Not Done.
- A task in an In Process status.
- A task in an Overdue status.
- A task in an Overdue status that cannot be Quick Charted or Quick Charted as Done.
- A task in a Pending Validation status.

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### Task List View Displays

A task list can be displayed in either Task View or Order View in both Multi Patient Task List and Single Patient Task List. The display view can be selected in the Options menu at the top of the screen.

**Task View:** Displays all tasks to allow personal preference for sorting tasks.

**Order View:** Groups all tasks related to the same parent order together. A third column is displayed and if more than one task is associated with an order, those tasks can be displayed by clicking Expand .

### Patient List, Time Frame, and Task List Display Customization

For complete steps for Selecting a Patient List and Setting Time Frames, please refer to our Clinical EHR Education website for Clinical and Clerical Staff Personalization.

### Documenting on a Task

For complete steps to document on a task please refer to our Clinical EHR Education website for In-Office Order Documentation.