From the Office of Clinical Informatics

Cerner Ambulatory – CCOM
Managing the Multi-Patient Task List

January 21, 2022

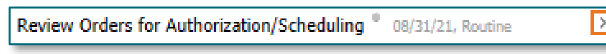
Imaging orders placed in Cerner will fire a task to the Multi-Patient Task List. The workflows to manage tasks on the Multi-Patient Task List for immediate and future action by viewing task details, using Message Center to communicate, and create reminders are outlined below.

Tasks for Immediate Action

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

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

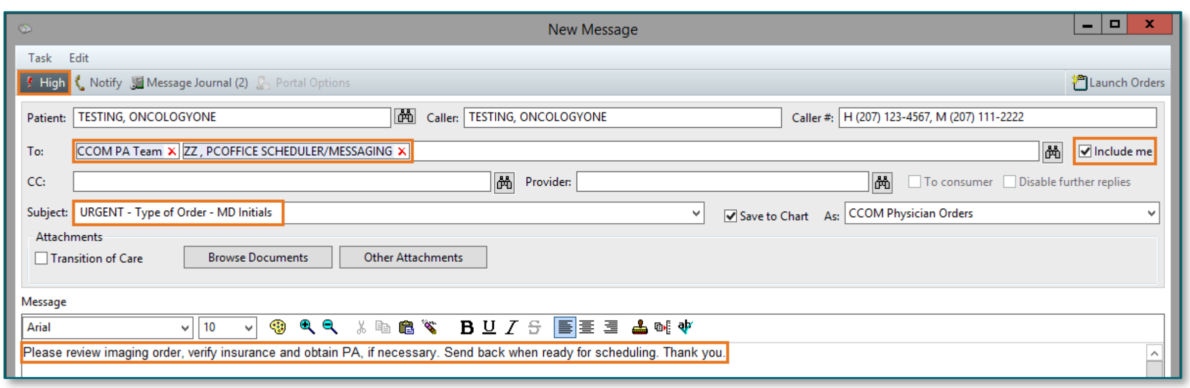
<ins>STEP 1</ins>: Scheduler reviews the task to identify what the test is for and what is requested by selecting the **carrot** in the Task/Order column.



<ins>STEP 2</ins>: Scheduler sends a message to the Prior Auth staff pool notifying them to verify insurance and obtain PA, if necessary.

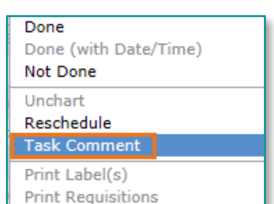
- For routine imaging orders, in the **Subject:** enter **Type of Scan – MD Initials – Due Date.**
- For urgent imaging orders, in the **Subject:** enter **URGENT – Type of Scan – MD Initials.**
- In the To: field, add **CCOM PA Team.**

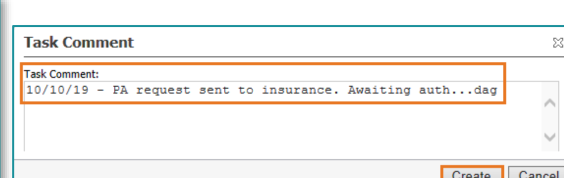
<ins>NOTE</ins>: Urgent imaging orders are processed the same as above, with the exception that the scheduler indicates in the Subject line of the message that the order is URGENT, so it will be processed as a priority and marking the message as a High Priority.



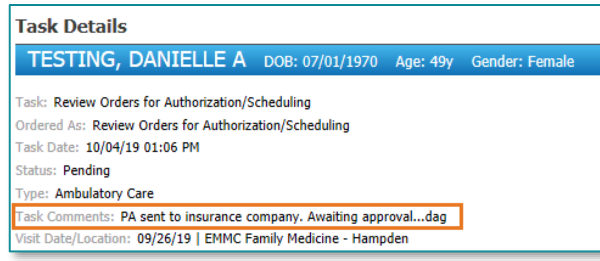
<ins>STEP 3</ins>: For tasks awaiting a response from a third party (prior auth, scheduling, etc.), indicate a **task comment** with the information:

- **Right-click** the task.



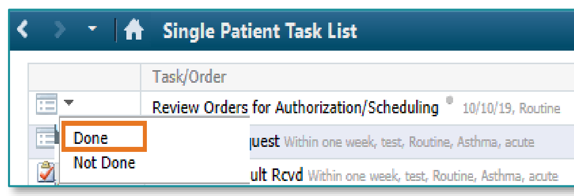


- Select **Task Comment.**
- Free text the comment in the task comment box including the date and your initials.
- Click **Create.**
- Task Comments can be viewed by selecting the **carrot** in the Task/Order column.



NOTE:	**Task comments are to be used to enter information for staff to quickly view the status (e.g., awaiting authorization approval). All other information is to be documented in the Prior Authorization iView Band.**

STEP 4: Once the PA has been obtained, the PA staff will document in the Prior Authorization Band and send a message back to the scheduler stating imaging is ready to be scheduled with the authorization number and authorized dates.

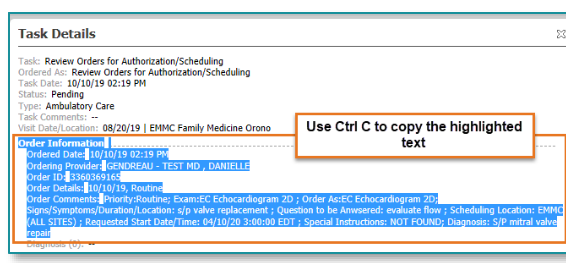


STEP 5: Once all information is gathered and the appointment is obtained, the scheduler will complete the task from the **Single Patient Task List** in the patient's chart.

Tasks for Future Action

For tasks that don't need scheduling/coordination for 3 months, or further out (i.e., echocardiogram in 6 months, CT Scan in 1 year etc.), the scheduler will create a message to send to the PA staff and resource scheduler pool with the order information and making note in the Subject of the message stating when the imaging order is due.

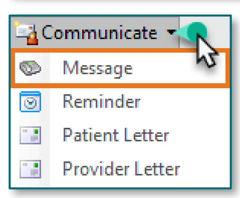
The PA staff will create a reminder from the message to start working on obtaining the PA in the future. The scheduler also converts the message to a reminder to book once the PA has been obtained.



STEP 1: Scheduler identifies 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 **Message** in the drop-down menu.

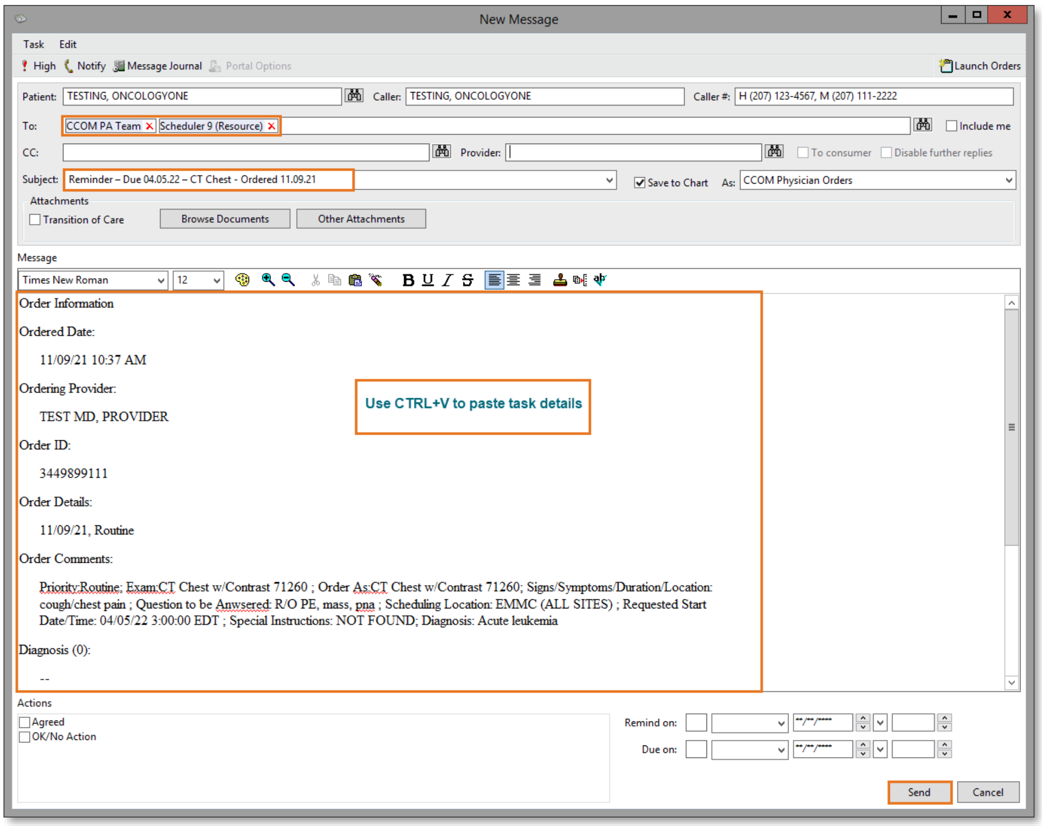


STEP 4: Use **Ctrl+V** to paste the copied task text into the body of the Message.

STEP 5: In the **To:** field, add:

- **CCOM PA Staff**
- **Scheduler 12 (Resource)**

STEP 6: In the **Subject:** field, type **Reminder – [Due Date] – [Name of Imaging Test] – [Date Order Placed]**.



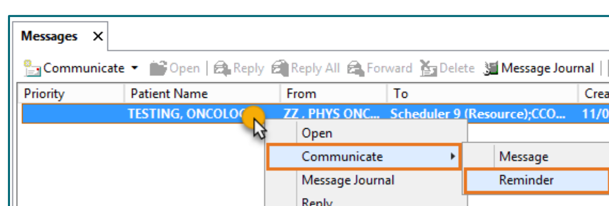
STEP 7: Click **Send**.

NOTE: **The task should not be completed at this time and will remain on the task list. The default timeframe is 2 weeks.**

NOTE: **The task will be available for completion on the Single Patient Task List (SPTL) at the indicated future date.**

Creating a Reminder from a Message

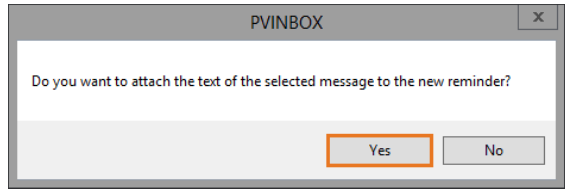
Reminders can be created from a message allowing the content of the message to be attached in the new reminder.



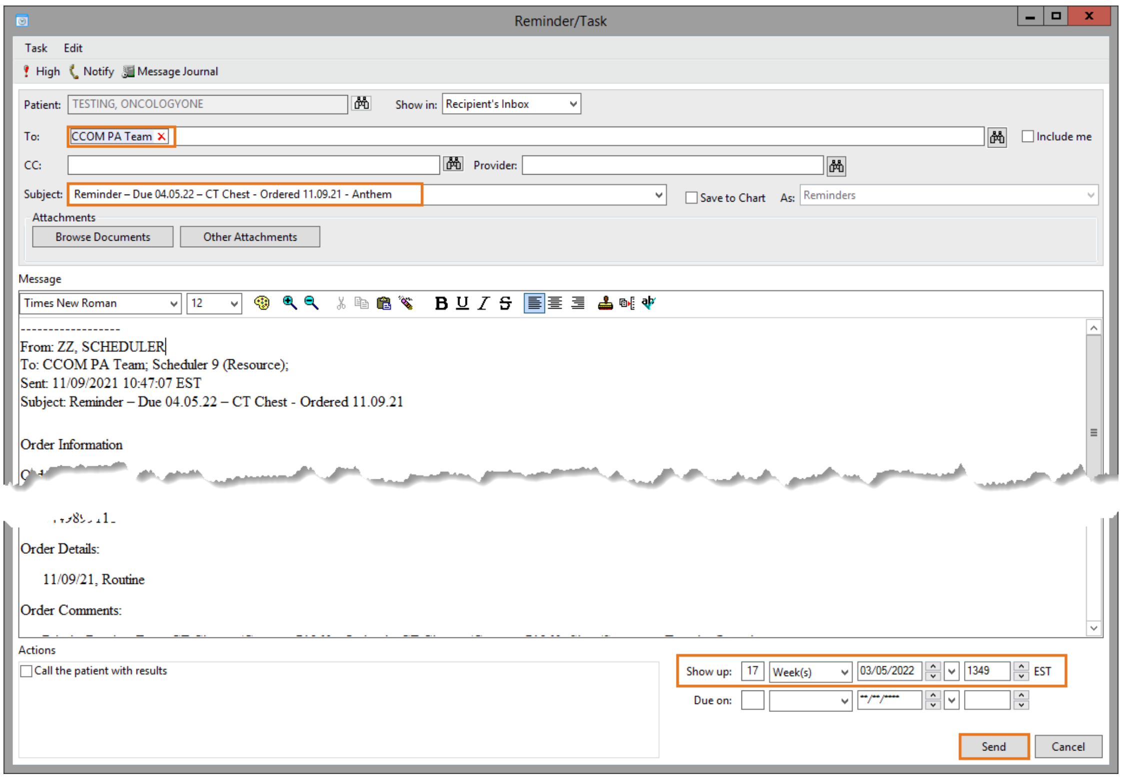
STEP 1: **Right-click** the message you want to convert to a Reminder.

STEP 2: In the menu, hover over **Communicate** and select **Reminder**.

<u>STEP 3</u>: A message will display asking if you want to attach the text of the selected message to the new reminder, click **Yes**.

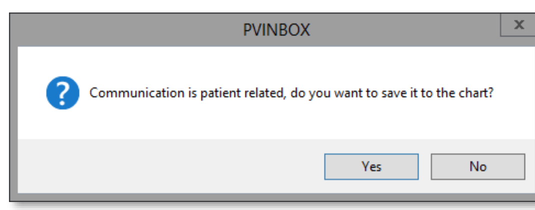


<u>STEP 4</u>: In the **Show Up:** field, select the timeframe in which you want to be reminded to commence the work.

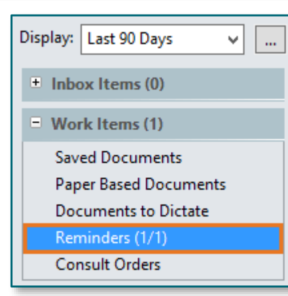


<u>STEP 5</u>: Click **Send**.

- A prompt will display stating communication is patient related, do you want to save it to the chart? Click **No**.



<u>Managing the Reminder and Task</u>



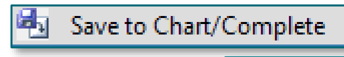
<u>STEP 1</u>: The reminder will appear on the date indicated for it to show up on in the recipient's Message Center under **Reminders**.

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

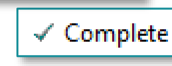
<u>STEP 3</u>: PA staff will document in the **Prior Authorization** iView band.

<u>STEP 4</u>: Once the prior auth has been obtained, the PA staff will send a message to the scheduler indicating the imaging order is ready to be scheduled with the necessary prior authorization information.

STEP 5: Document in the body of the reminder as needed to indicate that the task is completed and select the **Save to Chart/Complete** button.



- If no documentation is needed, simply click the **Complete** button in the toolbar.



- Each recipient will receive the same reminder; however, completing the reminder will not complete it for other recipients.

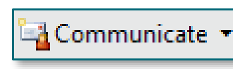
STEP 6: Once all information is gathered and the appointment obtained, the scheduler will complete the task from the **Single Patient Task List** in the patient's chart.

- After signing the Imaging Exam PowerForm, click the **refresh** icon . The task will be removed from the list.

Communication of Screening Information

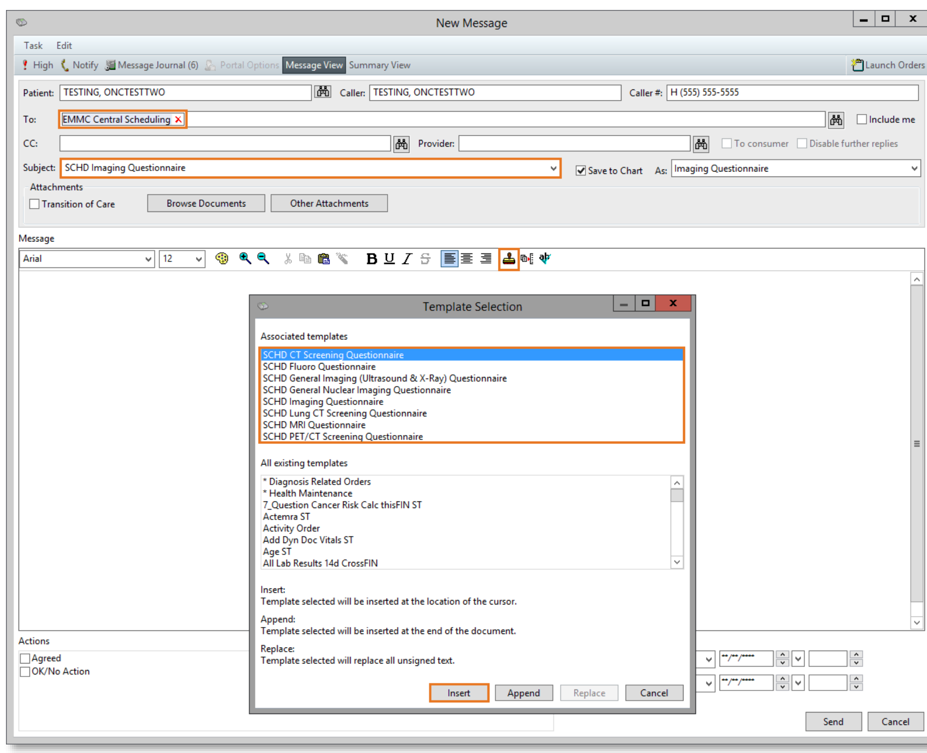
For exams done with NLH, screening information can be sent to Scheduling via Message Center.

STEP 1: From within the patient's chart, click **Communicate** on the toolbar.



STEP 2: Select the appropriate staff or pool to send the imaging screening questionnaires in the **TO:** field.

- In the **Subject:** line, select **SCHD Imaging Questionnaire** from the drop down.
- This will save the message as an **Imaging Questionnaire** in the chart.



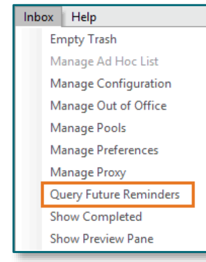
STEP 3: Click the **Insert Template** icon  on the toolbar.

STEP 4: Select the appropriate questionnaire template and click **Insert**.

- Use the **F3** key to tab through the underscores in the document to fill out the questionnaire.

STEP 5: When complete, click **Send**.

Query Future Reminders



- In Message Center, go to Inbox on the toolbar and select **Query Future Reminders**.
- Use the search filter options at the top of the window to view future reminders.

Unchart Task

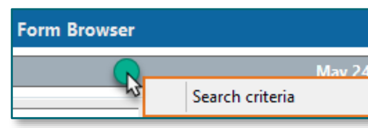
If a chart was completed in error, unchart the PowerForm by following the steps below to have the task appear back on the task list.

<u>STEP 1</u>: Within the patient's chart, navigate to the **Form Browser** in the **Menu**.

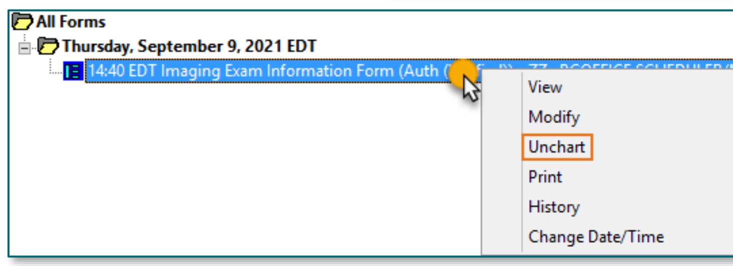
<u>STEP 2</u>: Locate the **Imaging Exam Information** form that needs to be uncharted.

<u>STEP 3</u>: The timeframe may need to be changed to locate the form.

- Right-click the gray bar and select **Search Criteria.**



<u>STEP 4</u>: Right-click the **Imaging Exam Information** form and select **Unchart**.



<u>STEP 5</u>: Enter a comment for uncharting the document.

<u>STEP 6</u>: **Sign** the uncharting form by clicking the green checkmark.

<u>STEP 7</u>: The task will now re-appear on the task list.

- The document will also appear with a red strikethrough within the Form Browser.