

## 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 (MPTL):

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

Review Orders for Authorization/Scheduling 03/18/24, Routine

**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 initials.
- Click **Create**.

Done  
Done (with Date/Time)  
Not Done  
Unchart  
Reschedule  
**Task Comment**

Task Comment

Task Comments: 4/3/25- PA request sent to insurance, awaiting auth. wav

Create Cancel

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

Task Details

Task: Review Orders for Authorization/Scheduling  
Ordered As: Review Orders for Authorization/Scheduling  
Task Date: 03/18/24 12:35 PM  
Status: Pending  
Type: Ambulatory Care  
Task Comments: 4/3/25- PA request sent to insurance, awaiting auth. wav  
Visit Date/Location: 07/06/23 | NL Acadia Jackson Lab Services

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

Single Patient Task List (Amb)

Task/Order

Done  
Not Done

### Tasks for Future Action

For tasks that do not need scheduling/coordination for three 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 what is requested by selecting the **carrot** in the Task/Order column.

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

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

**STEP 4:** Select **Reminder**.

Task Details

Task: Review Orders for Authorization/Scheduling  
Ordered As: Review Orders for Authorization/Scheduling  
Task Date: 03/18/24 12:35 PM  
Status: Pending  
Type: Ambulatory Care  
Task Comments: 4/3/25- PA request sent to insurance, awaiting auth. wav  
Visit Date/Location: 07/06/23 | NL Acadia Jackson Lab Services

Order Information

Ordered Date: 03/18/24 12:35 PM  
Ordering Provider: TEST MD, PROVIDER  
Order ID: 6749750615  
Order Details: 03/18/24, Routine  
Order Comments: Priority: Routine; Exam: PET Brain Imaging Alzheimers; Order As: PET Brain Imaging Alzheimers;  
Signs/Symptoms/Duration/Location: N; Question to be Answered: N; Scheduling Location: EMMC (ALL SITES); Requested Start Date/Time: 03/18/24 12:33:00 EDT; Special Instructions: NOT FOUND; Diagnosis: Atypical lobular hyperplasia (ALH) of breast  
Diagnosis (0):

Use Ctrl C to copy highlighted text.

Communicate

Message  
**Reminder**  
Patient Letter  
Provider Letter

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

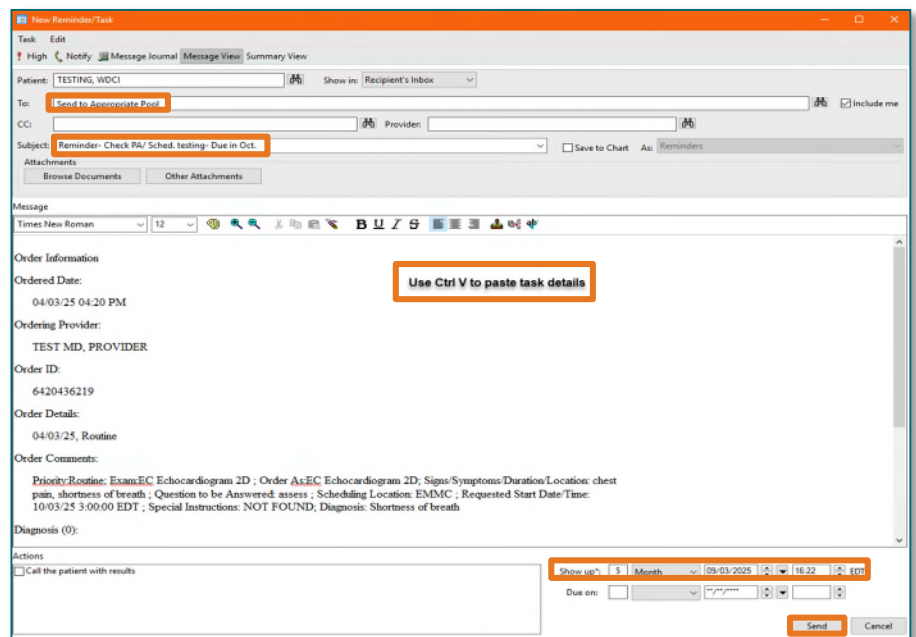
**STEP 6:** In the **To:** field, insert appropriate office pool.

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

**STEP 8:** In the **Show Up:** field, select the timeframe to be reminded to commence the work.

**STEP 9:** Click **Send**.

**STEP 10:** Add a task comment stating reminder created with the date and 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 two 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 indicated for it to show up 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, click the **Complete** button in the toolbar.

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

**STEP 6:** Complete the task as per usual workflow.

