From the Office of Health Informatics

PowerChart Ambulatory
Managing the Multi-Patient Task List

April 3, 2025

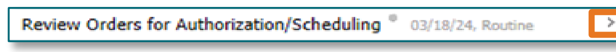
How to manage tasks on the Multi-Patient Task List for immediate and future action.

Tasks for Immediate Action

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

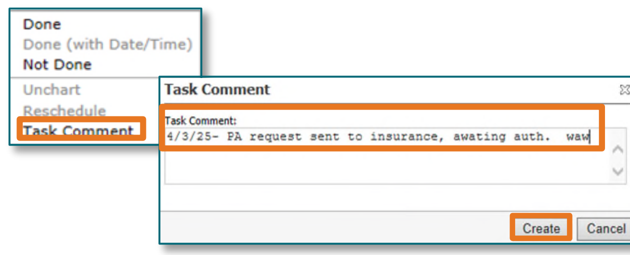
➢ **From the Multi-Patient Task List View (MPTL):**

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

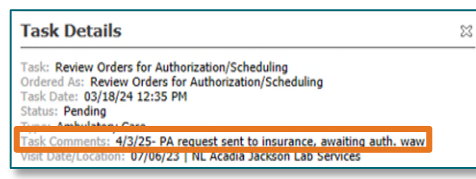


STEP 2: For tasks awaiting a response from a third party (prior auth, scheduling, etc.), indicate a **task comment** with that information:

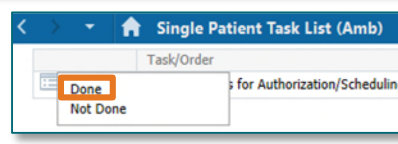
- Right-click the **task**.
- Select **Task Comment**.
- Free text the comment in the task comment box including the date and initials.
- Click **Create**.



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



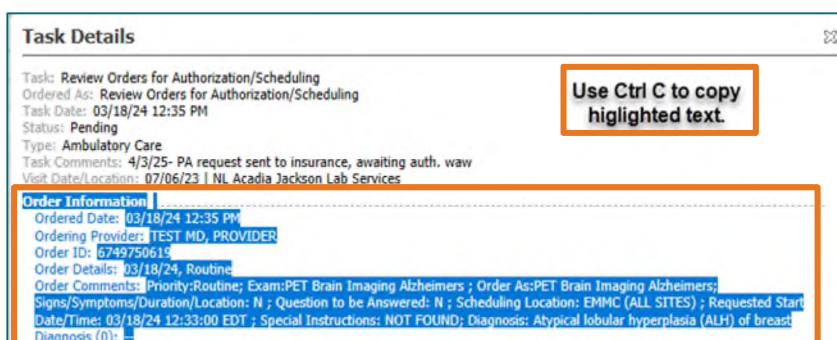
STEP 4: Once all information is gathered/appointment obtained, **complete** the task from the **Single Patient Task List** (SPTL) as per usual.



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.):

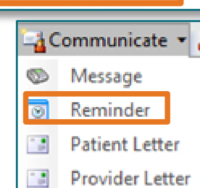
STEP 1: Identify what the test is for and what is requested by selecting the **carrot** in the Task/Order column.



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**.



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

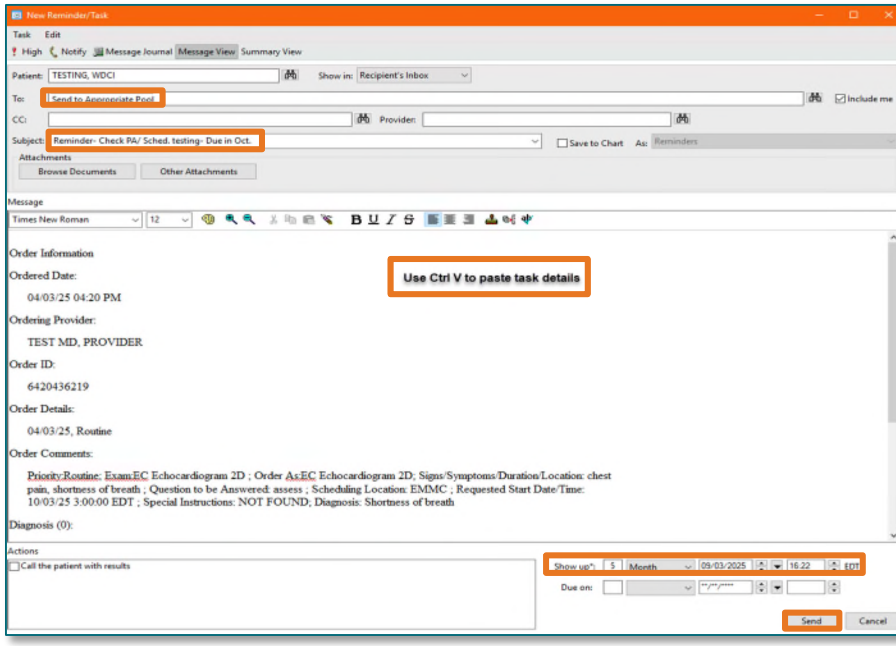
STEP 6: In the **To:** field, insert appropriate office pool.

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.

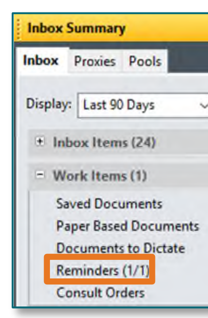
STEP 9: Click **Send**.

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.**

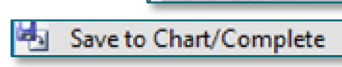
Managing the Reminder and Task

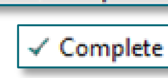


STEP 1: The reminder will appear on the date indicated for it to show up in the Message Center Pool under **Reminders**.

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 in 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.