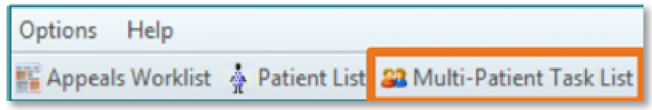
From the Office of Health Informatics

Acute Care Management
Using a Multi-Patient Task List

August 12, 2025

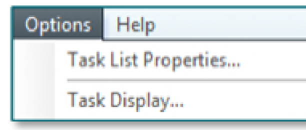
The Multi-Patient Task List is used to identify patients in which an INP Care Management Consult Order or INP Social Work Consult Order has been placed.

Setting Up the Multi-Patient Task List (MPTL)



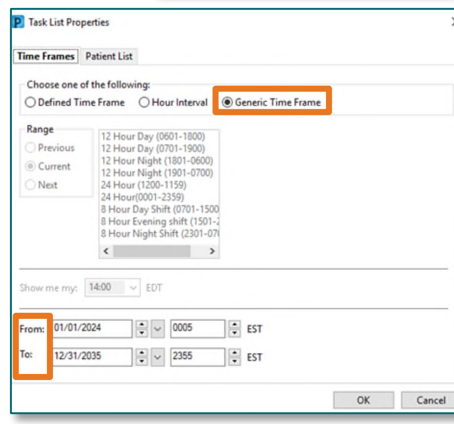
STEP 1: Select **Multi-Patient Task List** from the toolbar. The Task List displays.

STEP 2: Click **Options** in the toolbar.



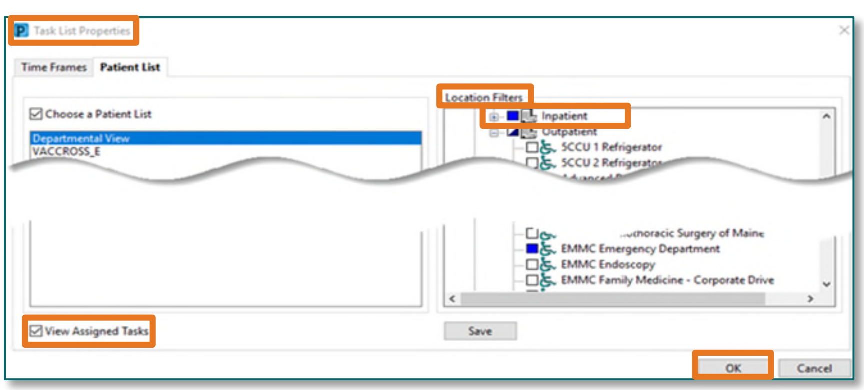
STEP 3: Select **Task List Properties**.

- Select **Generic Time Frame.**
- Select **From** and **To** date and time frames.



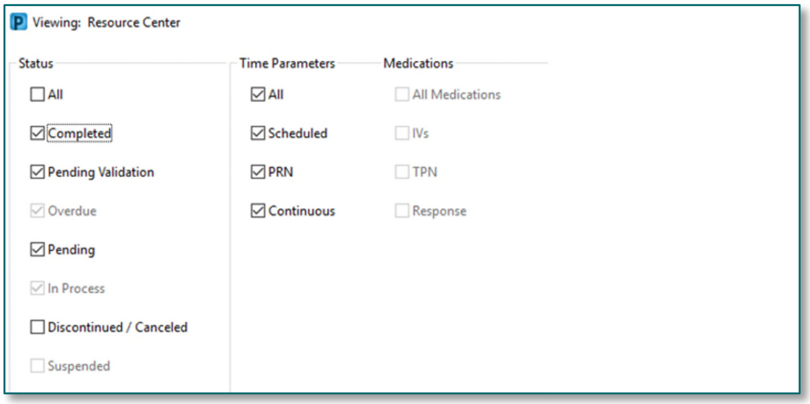
NOTE: **It is suggested that the TO: time frame be moved out several years to avoid having to update the time frame frequently.**

- Within the Task List Properties, click **Patient List** tab.
- Select the box to the left of **Choose a Patient List**.
- Select **Department View** from the list below.
- Next, on the right side under **Location Filters**, click the (+) next to the appropriate facility beginning with the initials NL.
- Select the box next to **Inpatient** to select all units. For staff covering specific units, click the (+) next to **Inpatient** and then select the desired units.
- For staff covering the Emergency Department, select the box next to Outpatient.
- Scroll and select the Emergency Department.
- Click **Save**, then **OK**.



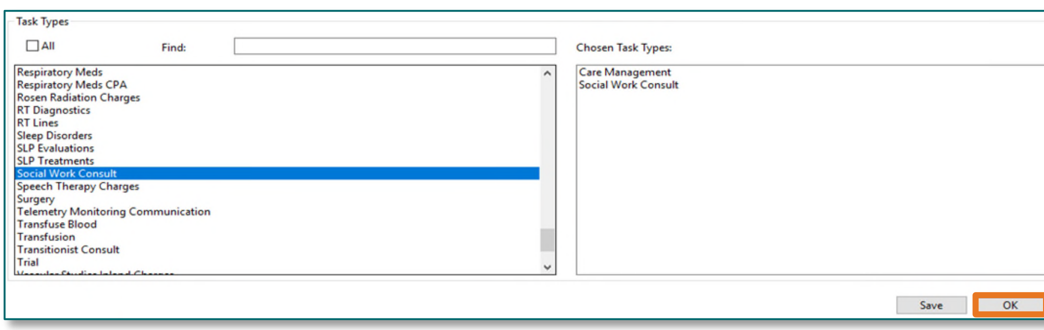
STEP 4: Click **Options** in the toolbar.

<u>STEP 5</u>: Be sure the following boxes are checked off in the **Status**, **Time Parameters** and **Medications** sections.



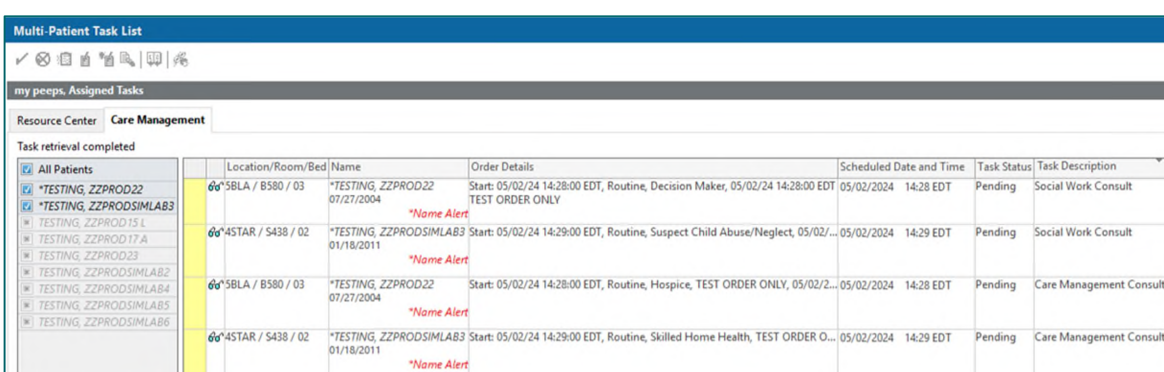
<u>STEP 6</u>: **Select Task Display.**

- Under Task Types, select **Care Management**, **Social Work Consult**, or **both** if applicable.
- Click **Save**, then **OK**.



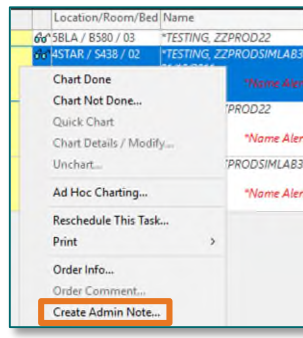
<u>Viewing the Multi-Patient Task List</u>

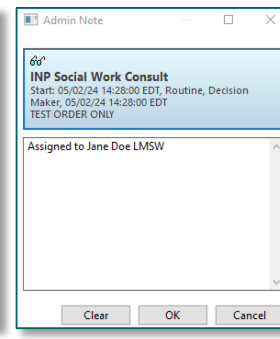
- If a patient list was selected rather than Department View, patients with an INP Care Management or INP Social Work Consult Order will be bolded.
- If Departmental View is selected, only those patients with a consult order will display on the left.



- **Multi-Patient Task List Columns**
  - **Location/Room/Bed** displays the nursing unit name, room number and bed assignment.
  - **Order Details** displays the order date, routine unless ordered stat, and the reason for the consult.
  - **Scheduled Date and Time** indicates when the order was placed.
  - **Task Status** will display **Pending** and will change to **Complete** when the task is charted as done.
  - **Task Description** is the order name that was placed.

Assigning Patients to Care Management Staff

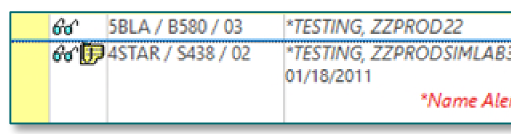




STEP 1: Staff will review all consults coming into the Care Management MPTL and assign themselves to applicable tasks.

STEP 2: To assign a task, right-click in the yellow box to the left of the Location/Room/Bed column and select **Create Admin Note**.

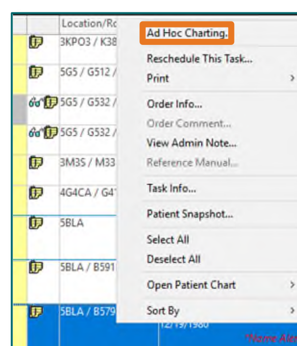
STEP 3: Type **name** in the note and click **OK**.



STEP 4: Refresh using the **minutes ago** button and a yellow notepad will display in the white box to the left of the Location/Room/Bed column.

STEP 5: To view who is assigned to a task, left click the **notepad** to open the note.

Documenting the Task

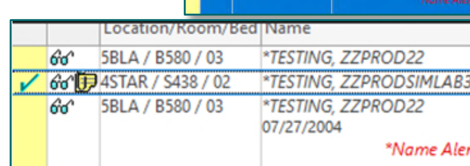


STEP 1: Right-click anywhere within the patient.

STEP 2: Select **Ad Hoc Charting** and document appropriately.

Completing the Task as Done

STEP 1: Click in the yellow box to the left of the Location/Room/Bed. A green checkmark will appear.



STEP 2: Refresh screen via the **minutes ago** button and the task will complete and is removed from the Multi-Patient Task List.