Certain orders, such as imaging orders and ECG orders, placed in Oracle Health (Cerner) will fire a task to the ONC Multi-Patient Task List (MPTL). Workflows used 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 in this flyer.

Tasks for Immediate Action

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

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

STEP 1:   Review the details in the **Order Details** column.

- Hover to see all the order details.

NOTE: **To help prioritize tasks needing immediate attention, "Stat" will display in the Scheduled Date and Time column for orders entered with a priority of STAT.**

NOTE: **For urgent imaging orders, the provider will send a message to the "CCOM Imaging Auths MO" pool to alert staff.**

STEP 2:   For tasks awaiting a response from a third party (prior auth, scheduling), enter a **task note**.

- Right-click anywhere in the patient row and select **Create Admin Note**.

  - Note is used to enter information regarding the status of the order for staff to quickly view.

- Once a note is documented, a note symbol 🗒️ will be in the second column.

STEP 3:   Notes can be viewed by clicking the note symbol 🗒️
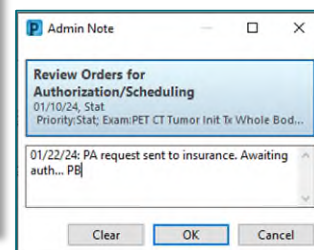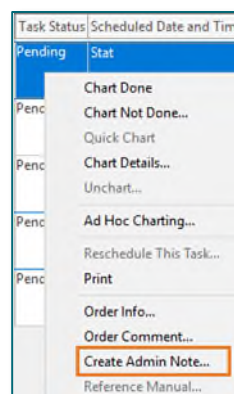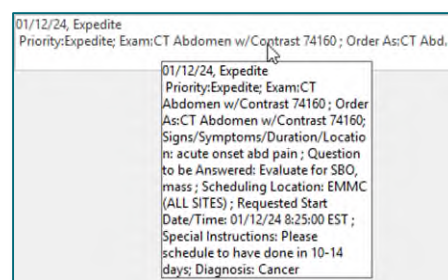
NOTE: **Task notes are to be used to enter information for staff to quickly view the status (e.g., awaiting authorization approval). All information is to be documented in the Prior Authorization iView Band.**

STEP 4:   Once the authorization has been obtained, staff will document in the **Prior Authorization Band** in iView and get the imaging appointment scheduled.

STEP 5:   Once all information is gathered and the appointment is obtained, staff will complete the task by double-clicking in the patient row in the MPTL to open the **Imaging Exam** Form.

- The task can also be completed by double-clicking the task in the **Task List** in the Menu within the patient's chart.

Tasks for Future Action

For tasks that don't need scheduling/coordination until a future date (i.e., echocardiogram in 6 months, CT scan in 1 year, etc.), staff will create a reminder for when to start working on obtaining the authorization with the order information and making note in the subject of the message stating when the imaging order is due.

STEP 1: Staff identifies what the test is for and the timeframe it is needed in by reviewing the details in the **Order Details** column.
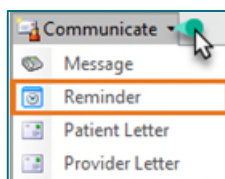
**STEP 2:** To copy the task details, right-click the task and select **Order Info**.
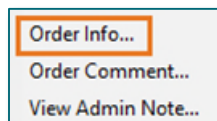
STEP 3: The **Ordering Information** window displays. Highlight the task details and use the **CTRL** and **C** keys to copy.

- Close the Order Information window once details have been copied.

STEP 4: Navigate to the **Communicate** button and select **Reminder** in the dropdown menu.

STEP 5: Use the **CTRL** and **V** keys to paste the copied task text into the body of the reminder.
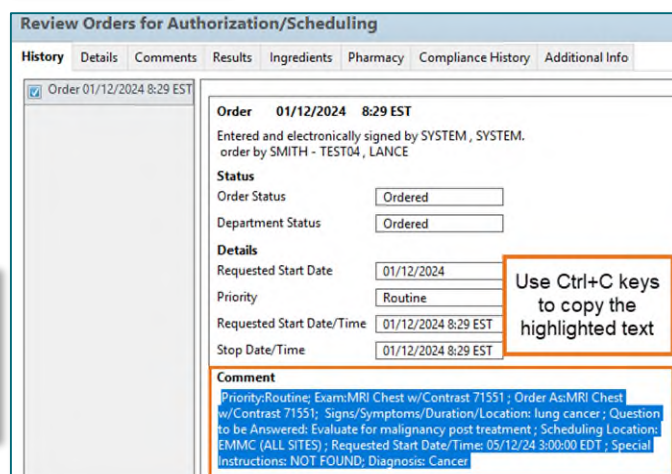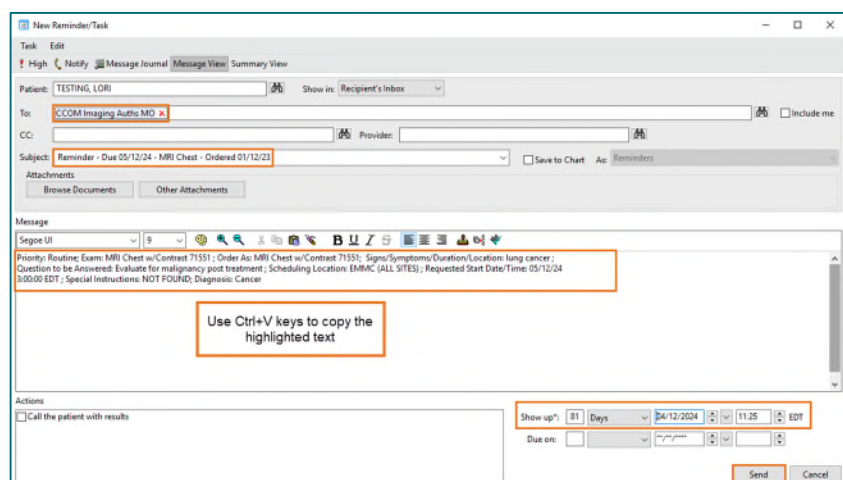
STEP 6: In the **To:** field, insert the appropriate pool(s).

STEP 7: In the **Subject:** field, type **Reminder – [Due Date] – [Name of Imaging Test] – [Date Order Placed].**

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 a reminder was created with the date and initials.

NOTE: **The task should NOT be completed at this time so it can remain on the task list.**

NOTE: **The task will be available for completion on the MPTL or the Task list in the Menu within the patient's chart 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 on in the recipient's Message Center under **Reminders**.

STEP 2:   Double-click the message and work the task as needed (i.e., obtain authorization, schedule exam, etc.).

STEP 3:   Use the Prior Authorization band to document information such as obtaining the authorization, getting the imaging appointment scheduled, etc.

STEP 4:   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 tool bar.

- After completing the reminder, it will be removed from the list of reminders.

STEP 5:   Once all information is gathered and the appointment is obtained, complete the task by double-clicking in the patient row in the MPTL to open the **Imaging Exam** Form.

- The task can also be completed by double-clicking the task in the **Task List** in the Menu within the patient's chart.
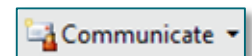
STEP 6:   After signing the Imaging Exam Form, refresh the screen. The task is removed from the list.
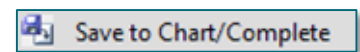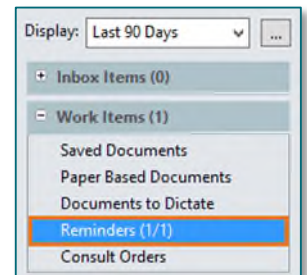
Communication of Screening Information

For exams completed with NLH, screening information can be sent to the Scheduling department 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 dropdown.

- 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**.
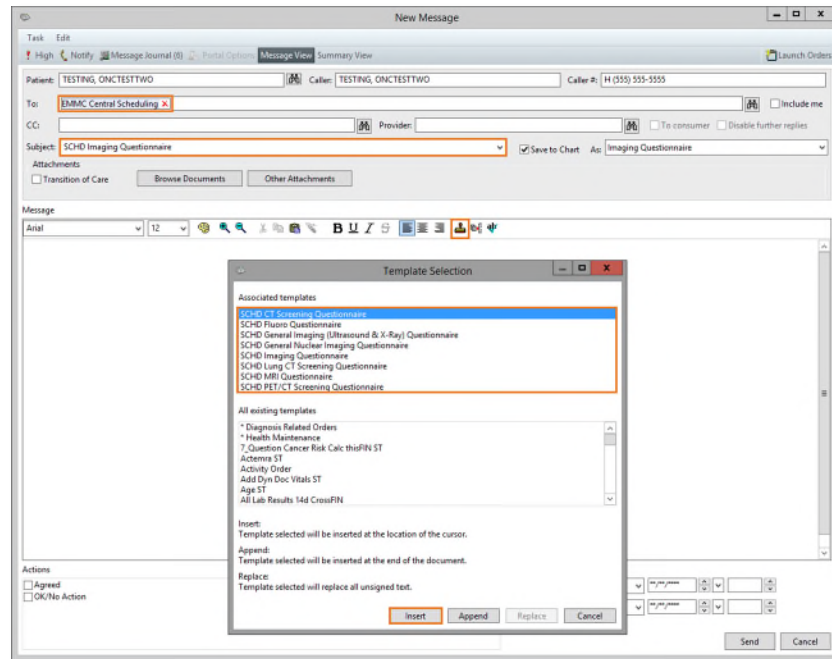
Uncharting a Task

If a task was completed in error, unchart the task by following the steps below to have the task appear back on the task list.
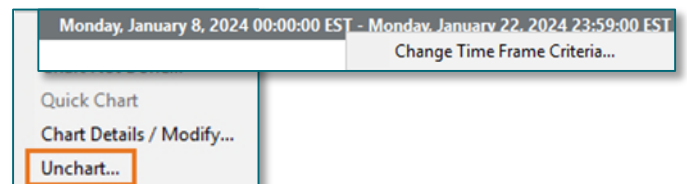
STEP 1:   From the **ONC Multi-Patient Task List**, go to the **Completed Tasks** tab.

NOTE: **This can also be performed from the Task List within the patient's chart.**

STEP 2:   Locate the task that needs to be uncharted.

STEP 3:   Depending on the date of the task, the timeframe may need to be changed to locate the form.

- Right-click the gray bar and select **Change Time Frame Criteria.**

**STEP 4:**   Right-click the task and select **Unchart**.

STEP 5:   Enter a comment for uncharting the task.

STEP 6:   **Sign** the uncharting of the form by clicking the green checkmark ✔.

STEP 7:   The task will now re-appear on the **Pending Tasks** tab.

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.
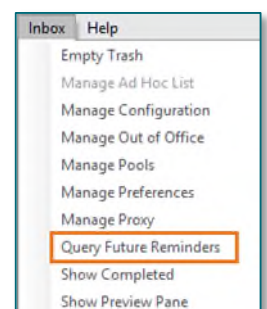
Creating a Reminder from a Message

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

**STEP 1:** Right-click the message to be converted to a reminder.

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

STEP 3: A message will display asking to attach the text of the selected message to the new reminder, click **Yes**.

STEP 4: In the **Show Up:** field, select the timeframe to be reminded to commence the work.

STEP 5: Click **Send**.

- A prompt will display stating communication is patient related and if it should be saved the chart? Click **No**.
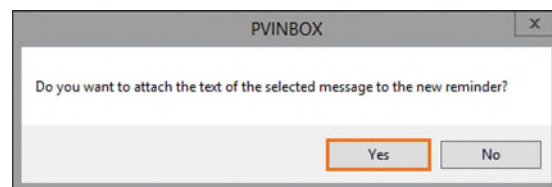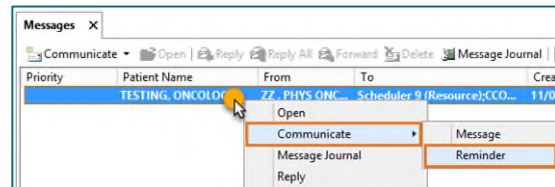
Managing ECG Orders

When ECG orders are placed, a task will fire to the Multi-Patient Task List.

➢ **PA/Imaging Scheduler**

- Send a message to the primary scheduler's pool to notify the scheduler there is an ECG order that needs to be scheduled.
  - Right-click the task and select **Create Admin Note.**
  - Add a comment in the task comment box stating a message has been sent to the primary scheduler's pool noting a message has been sent, then click **OK**.

Managing IR Port Placement Orders

When an Interventional Radiology (IR) Port Placement order is placed, a task will fire to the Multi-Patient Task List.

➢ **PA/Imaging Scheduling**

- Send a Message to the primary scheduler's pool to notify the scheduler there is an IR Port Placement order that needs to be scheduled.

NOTE: **Be sure to mark the message as a High priority by clicking the High priority button.** ❗ High
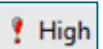
  - Right-click the task and select **Create Admin Note.**
  - Add a comment in the task comment box stating a message has been sent to the primary scheduler's pool noting a message has been sent, then click **OK**.

➢ **Primary Scheduling**

- In **Message Center**, open the message from the Imaging PA/Scheduling Team.

- Go to the patient's chart and click **Task List** in the Menu.

- Review the task details to identify what the test is for and what is requested by reviewing the details in the **Order Details** column.

  - Hover to see all the order details.

- Contact central scheduling at EMMC (extension 38500) to get the port appointment on the queue for radiologist review.

- Once approved by IR and scheduled, return to the patient's chart, and complete the task from the **Task List** by double-clicking the task.

- Document the date and time of the exam and that the patient is aware in **Imaging Exam/Study** field.

- Click the **green checkmark** ✔ to sign the documentation.