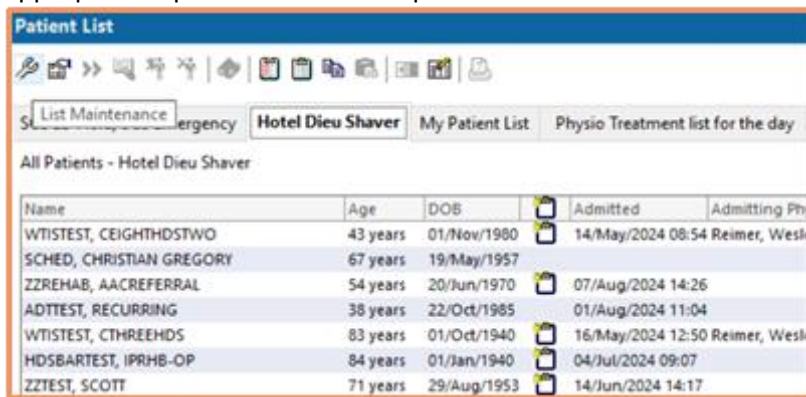


ALLIED HEALTH – CASE MANAGEMENT

Setting up the Multi-Patient Task List:

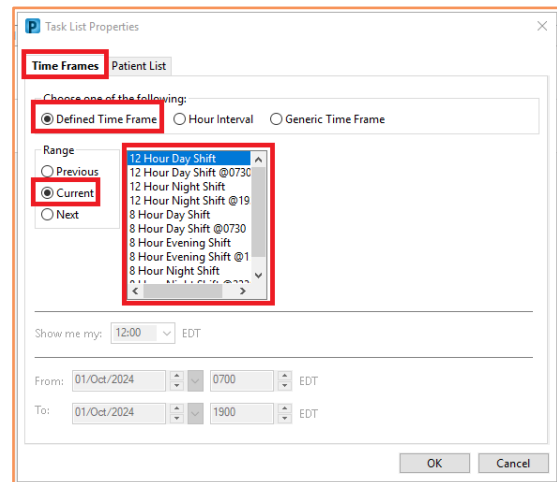
Ensure the patient list is created using the Patient List Maintenance view; please refer to the appropriate Tip Sheet for this setup.



Name	Age	DOB	Admitted	Admitting Phy
WTISTEST, CEIGHTHDSTWO	43 years	01/Nov/1980	14/May/2024 08:54	Reimer, Wesli
SCHEDE, CHRISTIAN GREGORY	67 years	19/May/1957		
ZZREHAB, AACREFERRAL	54 years	20/Jun/1970	07/Aug/2024 14:26	
ADTTEST, RECURRING	38 years	22/Oct/1985	01/Aug/2024 11:04	
WTISTEST, CTHREEHDS	83 years	01/Oct/1940	16/May/2024 12:50	Reimer, Wesli
HDSBARTEST, IPRHB-OP	84 years	01/Jan/1940	04/Jul/2024 09:07	
ZZTEST, SCOTT	71 years	29/Aug/1953	14/Jun/2024 14:17	

Once a Patient List is available, navigate to the Multi-Patient Task List and select **Options** from the top toolbar and then choose Task List Properties.

Manage *Time Frames* to ensure appropriate *Current* shift is selected as to avoid missing active tasks within the Multi-Patient Task List.



Task List Properties

Time Frames Patient List

Choose one of the following:

Defined Time Frame Hour Interval Generic Time Frame

Range

Previous Current Next

12 Hour Day Shift
12 Hour Day Shift @0730
12 Hour Night Shift
12 Hour Night Shift @19
8 Hour Day Shift
8 Hour Day Shift @0730
8 Hour Evening Shift
8 Hour Evening Shift @1
8 Hour Night Shift

Show me my: 12:00 EDT

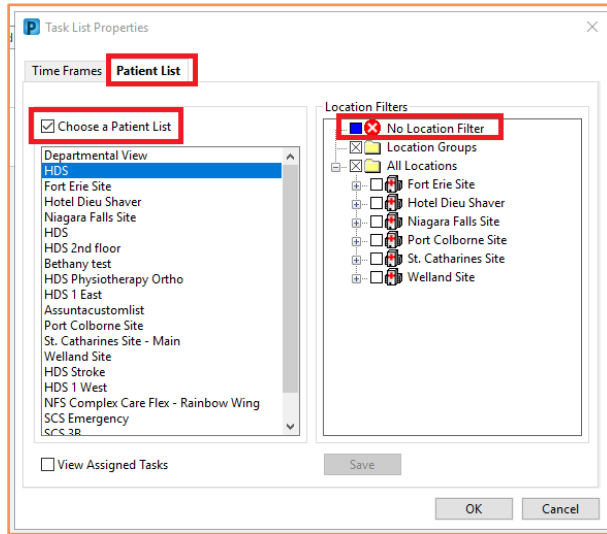
From: 01/Oct/2024 0700 EDT

To: 01/Oct/2024 1900 EDT

OK Cancel

CASE MANAGEMENT - MPTL TASKING

Select the **Patient List** tab from the top of the Task List Properties window. In the *Patient List* view, ensure the **Choose a Patient List** checkbox is selected. Choose one of the created Patient Lists from the left pane.



***Note:** If using a created patient list, avoid location filters as they will interfere. To do so, ensure to choose the **No Location Filter** in the right pane. The box should be blue when chosen.

Accessing Tasks/PowerForms from the Multi-Patient Task List:

Double clicking the task line will open the assigned PowerForm.

Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Date and Time	Task Description	Order Details
BARTEST, FAMED... 16/Oct/1972	11054060	SC ED / WR	Pending	2024-Dec-23 11:28	Case Management Consult	23/12/2024 11:28:00
BARTESTFIVE, RA... 02/May/1968	11053455	SC ED / A16 / A	Pending	2024-Dec-23 11:29	Case Management Consult	23/12/2024 11:29:00
BARTESTSIK, OTH... 01/Nov/1980	11054705	SC ED / WR	Pending	2024-Dec-23 11:29	Consult to Case Management - ALC Designation	23/12/2024 11:29:00
BROSKI, NUMBER... 18/Oct/2003	11054959	SC ED / WR	Pending	2024-Dec-23 11:30	Case Management Consult	23/12/2024 11:30:00
BROSKI, NUMBER... 18/Oct/2003	11054959	SC ED / WR	Pending	2024-Dec-23 11:30	Consult to Case Management - ALC Designation	23/12/2024 11:30:00
CHILD, HPEWS 05/May/2017	11054184	SC EDHOLD / B1 / A	Pending	2024-Dec-23 11:31	Case Management Consult	23/12/2024 11:31:00
CHILD, HPEWS 05/May/2017	11054184	SC EDHOLD / B1 / A	Pending	2024-Dec-23 11:31	Consult to Case Management - ALC Designation	23/12/2024 11:31:00
ECHNTEST, KATHY 01/Jan/2012	11000552	SC ED / WR	Pending	2024-Dec-23 11:32	Case Management SMART/QRT Assessment	23/12/2024 11:32:00



CASE MANAGEMENT - MPTL TASKING

Case Management Consult - BARTEST, FAMEDDOC

*Performed on: 23/Dec/2024 11:35 EST

Case Management Consult Information

Informed Consent Received For

Plan of treatment
 Patient did not consent
 Other:

Reason(s) for Referral

Abuse/neglect
 Access to medication
 Biopsychosocial assessment
 Capacity concerns
 Care planning
 Caregiver concerns
 Child protection concerns
 Counseling/therapy
 Emotional support
 Employment concerns

End of life care planning
 Financial concerns
 Grief/loss
 Home supports
 Housing resources
 Identification of patient/next of kin
 Legal concerns
 MAID
 Mental health
 Multiple admissions

New diagnosis
 Patient out of country/province
 PDA concerns
 RAAM Clinic
 Resource information
 Safety concerns
 Substance use [HDS]
 Uninsured patient
 Other:

48 Hour Conversation (NHS) Yes

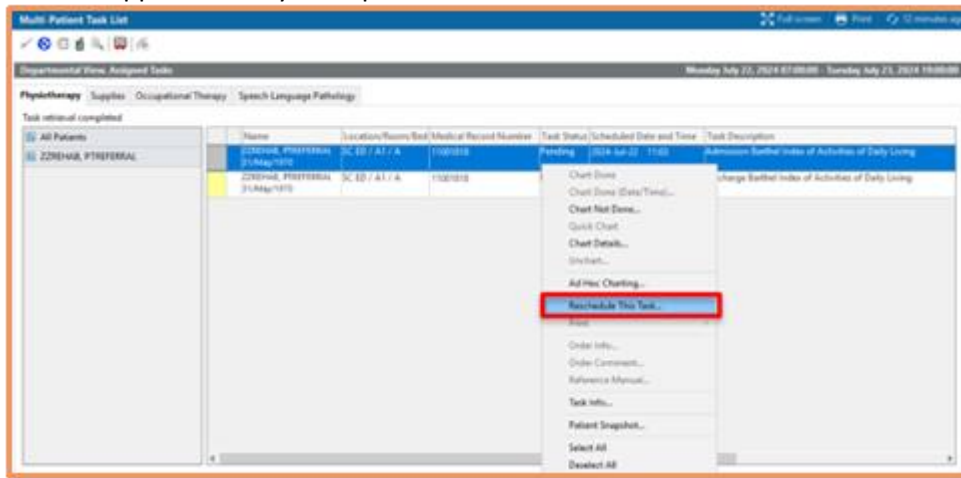
Date/Time 48 Hour Conversation Held

[Not needed at HDS; Important to all other Niagara Health Facilities](#)

***Note:** The Case Management Consult, the Consult to Case Management – ALC Designation, the Complex Care & Rehab Referral Application, and the Case Management QRT Assessment are respective consult orders. PowerForms **must** be completed from the Multi-Patient Task List to ensure documentation and order status remains sync'd with the Consult Order.

Rescheduling a Task:

A task on the MPTL will remain active for only 7 days or 168 hours from when it was originally ordered; it will disappear entirely once past this time frame.



Case Managers should use the *Reschedule This Task* feature within the first 3 days of the order, if there is a chance the patient will not be seen within the 7-day task time. Rescheduling a task resets the 7-day timer).

***Note:** The Case Manager QRT Assessments cannot be re-scheduled.

***Note:** The ability to reschedule tasks are available only from the *Multi-Patient Task List* and the *Single Patient Task List* (**Activities and Interventions** band on the blue table of contents in the patient's chart).

***Note:** The task can only be rescheduled up to 3 days from the original consult order.

- If a task was ordered 4 days ago, the task can no longer be rescheduled.
- If the task was ordered 3 days ago, the task can be rescheduled up to 3 days after the original 7-day task deadline.

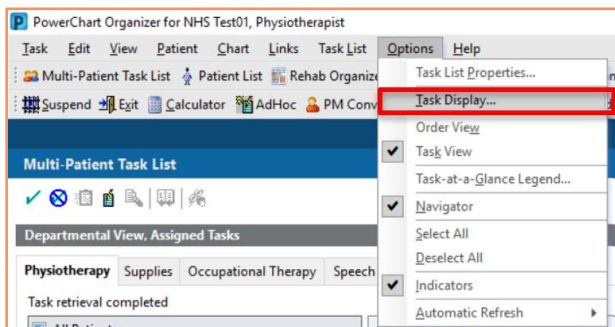
Task Statuses and How to View Them:

Overdue status will occur after a task has been assigned for more than 1 hour.

Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Date and Time	Task Description
BARTEST, FAMEDDOC 16/Oct/1972	11054060	SC ED / WR	Overdue	2024-Dec-23 11:28	Case Management Consult
BARTESTFIVE, RADIOLOGIST 02/May/1968	11053455	SC ED / A16 / A	Overdue	2024-Dec-23 11:29	Case Management Consult
BARTESTSIX, OTHERINS 01/Nov/1980	11054705	SC ED / WR	Overdue	2024-Dec-23 11:29	Consult to Case Management - ALC Designation
BROSKI, NUMBERONE 18/Oct/2003	11054959	SC ED / WR	Overdue	2024-Dec-23 11:30	Case Management Consult
BROSKI, NUMBERONE 18/Oct/2003	11054959	SC ED / WR	Overdue	2024-Dec-23 11:30	Consult to Case Management - ALC Designation
CHILD, HPEWS 05/May/2017	11054184	SC EDHOLD / B1 / A	Overdue	2024-Dec-23 11:31	Case Management Consult
CHILD, HPEWS 05/May/2017	11054184	SC EDHOLD / B1 / A	Overdue	2024-Dec-23 11:31	Consult to Case Management - ALC Designation

Other types of Task Status:

- **InProcess** – a PowerForm that has been saved by the end-user with some completed documentation.
- **Pending Validation** – a PowerForm that has been submitted by a student and requires co-signature.
- **Completed** – a PowerForm that has been completed, but the MPTL has not yet been refreshed to omit the task from the MPTL.



Tip: In the *Options*, you can adjust the **Task Display**. To broaden the types of tasks visible in the default settings – which are recommended to be kept as is – users can choose to include *Completed* tasks if needed. The default settings currently display are Pending Validation, Overdue, Pending, and In Process tasks.



CASE MANAGEMENT - MPTL TASKING

Default Task Status display

Viewing: Case Management

Status

- All
- Completed
- Pending Validation
- Overdue
- Pending
- In Process
- Discontinued / Canceled
- Suspended

Choosing Completed status as additional task visibility

Viewing: Case Management

Status

- All
- Completed
- Pending Validation
- Overdue
- Pending
- In Process
- Discontinued / Canceled
- Suspended



CASE MANAGEMENT - MPTL TASKING

Once Completed Status is chosen to display, any completed tasks will become visible on the MPTL.

✓	*SYSTEMTEST, MHAFORT... 14/Feb/1999 <i>*Name Alert</i>	11001100	SC 1AA / SC1A02 / A	Complete	2024-Dec-12 09:20	WTIS - ALC Tracking
✓	*WTISTEST, CSIX 01/Feb/1942 <i>*Name Alert</i>	11024444	SC 4AD / SC4A25 / A	Complete	2024-Dec-05 10:06	WTIS - ALC Tracking
🗨️ ✓	*ZZREHAB, CUTOVER 01/Nov/1954 <i>*Name Alert</i>	11054759	SC 3AA / SC3AEX / A	Complete	2024-Dec-16 14:39	Case Management SMART/QRT Assessment
🗨️ ✓	*ZZTEST, STROKEONE 19/Dec/1979 <i>*Name Alert</i>	11000515	SC 2AC / SC2A17 / A	Complete	2024-Dec-17 09:40	Case Management SMART/QRT Assessment

***Tip:** The MPTL can be printed by selecting the Print icon near the Refresh button.

