

### ALLIED HEALTH - CASE MANAGEMENT

This Tip Sheet is intended to help end users understand when to use the Chart Not Done feature within the Multi-Patient Task List (MPTL).

### **Charting Not Done**

Navigate to the Multi Patient Task List (MPTL)

- Right-click the assigned task from the task list
- Locate the **Chart Not Done** option; select that option.
- In the **Chart Not Done** window that opens, select an option from the drop-down menu and add any additional notes to the *Comment* area as needed. Click on the green check mark when done, to sign and submit.

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### **Rescheduling a Task**

A task will remain on the task list for 7 days (or 168 hours) from the date and time of the initial order. Case Managers can reschedule a task, using the **Reschedule This Task** feature, within 3 days (or 72 hours) of the initial order. After this period, the option to reschedule that specific task will be disabled.

The maximum duration a task can remain on the task list, including any rescheduling, is 10 days, after which the task will be removed. If a task is not rescheduled, it will disappear from the MPTL after 7 days. Once a task has disappeared, it cannot be retrieved, though the initial order will remain in an *Ordered* status and will not be marked as *Completed*.

It is important to retrieve PowerForms from the task list, so that the PowerForm is linked to the initial order. It is highly recommended that the task be rescheduled within 3 days of the initial order, if the end user suspects the task will not be completed within 7 days.



### How to Reschedule a Task

• Locate the task on the MPTL that needs to be rescheduled.

• Right-click the task and locate the **Reschedule This Task** option from the drop-down menu.

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• Choose Reschedule This Task.

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Documented on Incorrect Order Documented on Incorrect Patient Equipment/Supplies Not Available Medication Not Available Nausea/Vomiting
Parent/SDM Declined
Patient LOA
Patient Sleeping/Sedated
Prescriber Consultation Required
Stagger to Standard Administration Time

#### • The Reschedule window will open.

• Make sure to choose a *Rescheduled* date and time, and then a *Rescheduling reason* from the drop-down menu.

• Once both items are completed, click **OK** to finish rescheduling the task.

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#### Reviewing Chart Not Done in the Patient's Chart

If **Chart Not Done** was utilized on an assigned task from the MPTL, its details can be reviewed by right- clicking the Order and selecting "**Results...**".

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If accessing this information through **Results Review** on the patient's chart, choose the **Assessments View** tab and choose **Clinical Info** for the **Flowsheet** from the drop-down menu.

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PowerForm Activities & Inf	Discharge Information Transportation	Accessible transportation	
	Advance Directive Information		
	Advance Directive Information Advance Directive PowerForm Activities & Interventions	Yes	
	Advance Directive Information Advance Directive PowerForm Activities & Interventions PT Acute/Inpatient Assessment - Form	Yes	Not Done *

\*\*Right-click on the **Not Done** in the column to find more details about this data entry, including who completed it, when, and the comments entered.

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### Additional Instructions

#### How to Display Completed Orders in the Patient's Chart

\*Note: Once the **Chart Not Done** feature is utilized, the Consult Order status will flip to *Completed*. The default display settings for Orders are set to *All Active Orders*. Therefore, the Order that the end user needs to view, will not display. To see *Completed* Orders:

- Navigate to the patient's chart.
- Select **Orders** from the blue Table of Contents.
- Select the blue hyperlink font above the Orders titled "Displayed..."
- Choose from either a pre-determined Display list from the drop-down menu, or create a custom view by selecting the appropriate options.
  - Note: Utilize All Orders (All Statuses) from the drop-down menu for quick access.
- Select **Apply** in the **Advanced Filters** window to close and apply the view settings.
- Locate the **Completed Order** that is associated to the task that was charted "*Not Done*".
- Right-click the Order and choose **Results**.
- Once the Order Information window is opened, the **Not Done** entry can be rightclicked. Choose "*View Details*" to review any notes entered by the end user.

### Navigating to Results Review

- Navigate to the patient's chart.
- Select **Results Review** from the blue Table of Contents.
- Select the Assessments View tab from the list of tabs near the top of the Results Review MPage.

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- Select **Clinical Info** as the *Flowsheet* from the drop-down list.
- In the **Navigator** pane, de-select all the listed items, except for **PowerForm Activities & Interventions** to view only items charted **Not Done**.
- Any of the individual cell's associated with a **Not Done** can be right-clicked; choose "*View Details*".

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