

# Create To do lists

Last Modified on 03/03/2025 10:35 am AEDT

Manage Tasks using practitioner and patient To Do Lists. Tasks support pop-up reminders and comments and are marked as complete when finished.

#### Considerations

- Within the **Practitioner** To Do List, there is the option to link the task to the Patient.
- Within the Patient To Do List, there is the option to link the task to the Practitioner.
- When a patient is linked to a Task, a reminder for that task will pop-up for all users when that patient's record is opened.
- A To Do List can **not** be viewed by other users if **no** patients are linked.
- Tasks on a Patient's To Do List (and who added the task) can be viewed by all practitioners.

### Doctor's To Do List

The doctor's To Do List lets you select from a list of common tasks and add the task to a patient's To Do List.

To add a task:

- 1. Select the **To Do List** from the top menu.
- 2. Use the **Date** field to set the due date for the task.
- 3. Add the Action Description by double-clicking an Action from the list or type in the description.

The Action Description cannot be changed once the Task has been created.

- 4. Add any comment in the field provided.
- 5. Select Patient To Do List if you want to add this task to a patient's To Do List.

This will open the Find Patient dialog so you can select the patient.

6. Select OK.

PDAVIS - To [	Do List					×
Due Date 20/03/2025 25/03/2025 28/03/2025 28/03/2025 23/04/2025	Action Diabetes Review Check staff roster Full Medical Check-Up Skin Check Care Plan Review	Patient Name <u>Holloway, Andrea</u> J <u>enkins, Faye</u> Khoury, Brett Hansen, Chantel	Last Performed Date	Entered By PDAVIS PDAVIS PDAVIS PDAVIS PDAVIS	Entered Date 03/03/2025 03/03/2025 03/03/2025 03/03/2025 03/03/2025	Comment Entered
		Add to List	×			
<	Add to List	Date 03/03/2025     Ongoing     Action Description     Blood Pressure Review     Breast Examination     Care Plan Review     Cholesterol Review     Full Medical Check-Up	· ·			<u>C</u> lose
		Comments				
		Assign To  Doctor To Do List  Patient To Do List				

## Patient's To Do List

You can add **Tasks** or **Recalls** to the patient's To Do List, like a blood pressure check the next time they come in. This task can also be added to the doctor's To Do List, like a follow-up call to the patient the next day.

If a patient has a task assigned to them, their Task List will open when their clinical record is opened by any practitioner.

#### To add a task:

- 1. Select the **To Do List** icon above the **Summary Views** section.
- 2. Add an **Action** or **Recall**.

Add the Action Description by double-clicking an Action from the list or type in the description.

The Action Description cannot be changed once the Task has been created.

- 3. Select **Doctor To Do List** if you want to add the task to the doctor's To Do List.
- 4. Select OK.

Holloway, Mr Knu	t	Add to List >	< ation: 00:11:56		
Address: 5 Jacob PI, BUGLE RANGES 5251 DOB: 19/05/1952 Home: r Age: 72 years Work: Medicare No: 59502861421 Mobile: 0 File No: 4 Occupation: F Hosp UR No: MHR Status: My Health Record available, Consent Referrer: Dr Vivian Mortier		Action Description Blood Pressure Review	rations Referrals Immunisations Allerg		
Problems	Holloway, Knut - To Do List	Comments	1		
Referrals Results	Due Date Action 13/01/2025 Blood Pressure Review		Entered Date Comments 13/01/2025		
Immunisations		Assign To			
Allergies		Doctor To Do List			
Images/ECG		Patient To Do List Holloway, Knut	1		
Documents			1		
Attachments		V OK X Cancel			
Measurements	<				
Medications	show window Add to List	Delete from List Action Performed Comme	ents Add Recall 🗸 <u>C</u> lose		

#### To add a comment:

- 1. Select the task.
- 2. Select the **Comments** button.

You can view previous comments and add new ones.

Black, Emma	- To Do List					×
Due Date	Action	Last Performed Date	Entered By	Entered Date	Comments	
30/06/2025	Blood Test		PDAVIS	24/06/2024	Entered	
	Comments Existing Comments			×		
	03/03/2025 - Patient has	03/03/2025 - Patient has been told not to eat from midnight				
<	-					>
show win	dow			~ 0	d Recall	V <u>C</u> lose
	New Comments	New Comments				
	Patient advised tey had o	offee this morning		^		
				~		
		🖌 Add Commer	nt 🗙	<u>C</u> ancel		

## **Actioned Tasks**

Tasks should be marked as actioned when complete. This applies to both practitioner and patient To Do Lists.

To mark a task as actioned:

- 1. Select the Task
- 2. Select Actioned performed.

The Task will turn green to indicate it has been completed.

You can remove a task using the **Delete** button.

PDAVIS - To D	lo List					×
Due Date 25/03/2025	Action Check staff roster	Patient Name	Last Performed Date	Entered By PDAVIS	Entered Date 03/03/2025	Comment
28/03/2025	Full Medical Check-Up	Jenkins, Faye		PDAVIS	03/03/2025	
28/03/2025	Skin Check	Khoury, Brett	03/03/2025	PDAVIS	03/03/2025	Entered
23/04/2025	Care Plan Review	Hansen, Chantel	03/03/2025	PDAVIS	03/03/2025	Entered
2						
show win	dow Add to List Delete from	m List Action Performe	d Comments	1		Close