Create To do lists

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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

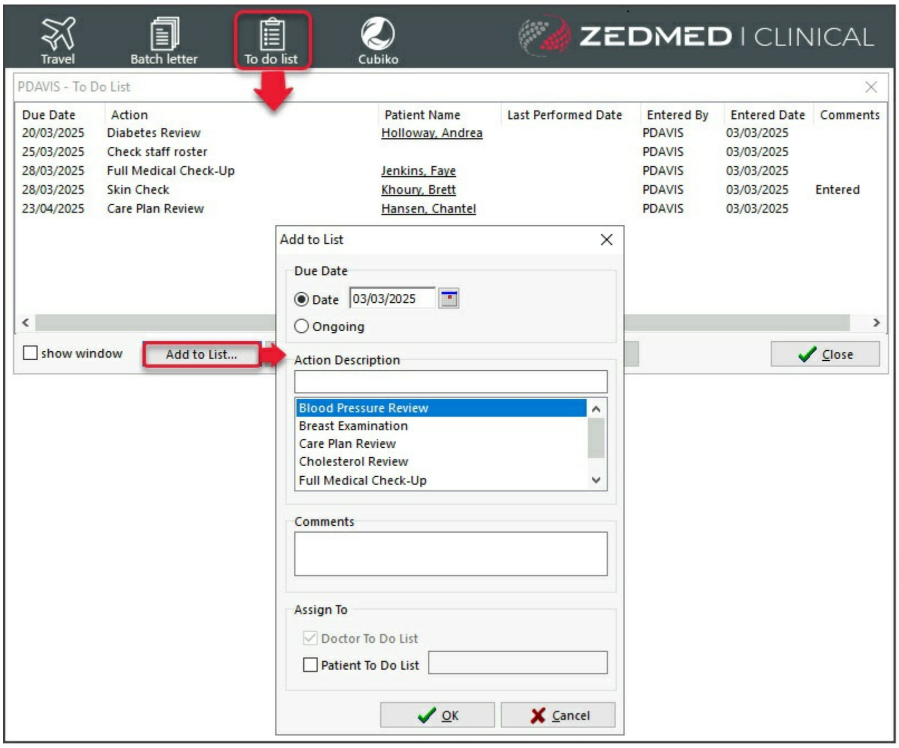
The doctor's To Do List lets you select from a list of common tasks and add the task to a patient's To Do List.

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**.



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.

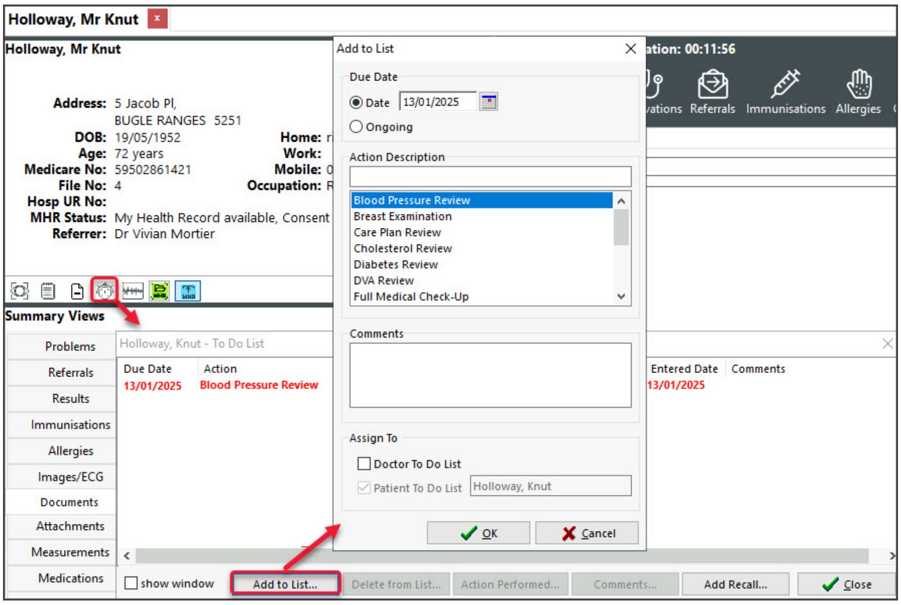
If a patient has a task assigned to them, their Task List will open when their clinical record is opened by any practitioner.

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.

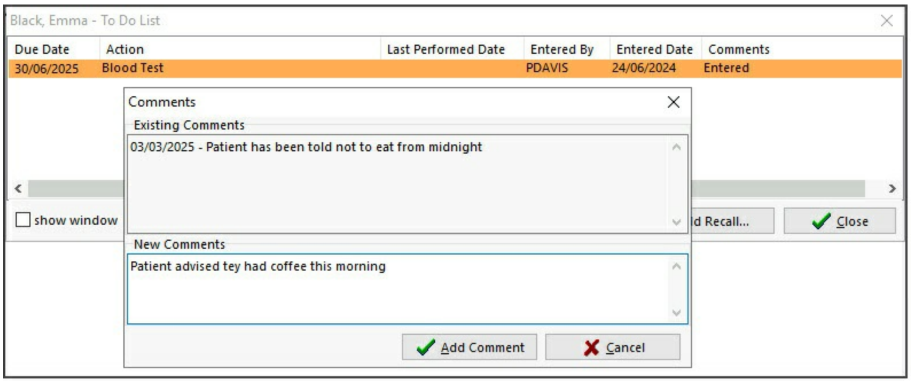
   The Action Description cannot be changed once the Task has been created.
3. Select **Doctor To Do List** if you want to add the task to the doctor's To Do List.
4. Select **OK**.



To add a comment:

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

   You can view previous comments and add new ones.



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 Do List
Due Date
Action
Patient Name
Last Performed Date
Entered By
Entered Date
Comments
25/03/2025
Check staff roster
PDAVIS
03/03/2025
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
show window
Add to List...
Delete from List...
Action Performed...
Comments...
Close