

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> Jenkins, Faye 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 | × | | | |
| < | show window Add to List | Date 03/03/2025 Ongoing Action Description Biood Pressure Review Breast Examination Care Plan Review Cholesterol Review Full Medical Check-Up | | 1 | | <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: 59502661421 Mobile: 0 File No: 4 Occupation: F Hosp UR No: MHR Status: My Health Record available, Consent Referrer: Dr Vivian Mortier | | Due Date Due Date Date Date Date Date Date Date Date | rations Referrals Immunisations Allergi | | |
| Problems | Holloway, Knut - To Do List | Comments | | | |
| Referrals Results | Due Date Action 13/01/2025 Blood Pressure Review | | Entered Date Comments 13/01/2025 | | |
| Immunisations | | Assign To | | | |
| Allergies | | | | | |
| Images/ECG | | Ratient To Do List Holloway, Knut | | | |
| Documents | | · Patient to Do List | | | |
| Attachments | | V OK X Cancel | | | |
| Measurements | < | | | | |
| Medications | show window Add to List | Delete from List Action Performed Comme | nts Add Recall VClose | | |

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 been told not to eat from midnight | | | | | > |
| show window | dow | | | ~ | d Recall | ✓ <u>C</u> lose |
| | New Comments | - ff - Abis | | | | |
| | Patient advised tey had | | | | | |
| | | Add Commer | it 🗙 | <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 |
| 23/04/2025 | Care Plan Review | Hansen, Chantel | 03/03/2025 | PDAVIS | 03/03/2025 | E |
| < | | | | | | |
| | | | Comments | | - | 10 |