Streamlining the Electronic Paperwork: Worklists, Batch Sign & Tasklists

Help Desk
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Rather than doing all of your work from the Task List, try starting from your **Worklist**. A single click on the patient’s name on the left lets you see what needs attention on the right. Items that will pull into your Worklist include meds that require authorization, as well as labs and radiology results that need verification.
Your Worklist contains all items that require authorization or verification: i.e., labs, medications, and radiology results that are done at a MSHA location.

To authorize multiple items simultaneously, hold down the Shift key and click on the items you want to authorize. You can highlight blocks of items with the Shift key – just click the first and last items, and it will highlight everything in between. To highlight specific items, use the Ctrl key and click each item you want to authorize. Click **Authorize** to authorize all highlighted items.
Viewing the Chart from the Worklist Tab

If you are on the Worklist tab, and you need to view the patient’s chart, you can click the QuickChart icon. This opens the patient’s Clinical Desktop in a separate window, so you can review the chart prior to verification/authorization of the item.
Radiology Results from the Worklist

Clicking on your patient’s name will show the radiology result; however, it is an abbreviated result. To see the entire result, you need to **double click** the result. This allows you to read the entire report, and also gives you access to the ImageLink button, so you can actually log into the PACS system and view the image, if desired.
You can also forward items from your Worklist to your residents (or another provider) for verification. Just make sure they know to check their Worklist so nothing falls through the cracks! Click Update Provider, and choose an Encounter Date from the list of existing encounters. Click OK.
Click the binoculars to search for the resident. Search by their last name, and then click OK.
You can also include comments in the Annotation field. When the resident/provider views this on his/her worklist, the comments typed in the annotation field will appear at the top of the result. The resident can then verify the lab, and contact the patient, etc.
A common complaint when verifying labs is the extra step that is required to sign the note that is created automatically by the system.

Using the Worklist and the Batch Sign tab may speed up this process.

From the Worklist tab, click Call Pt with Results (or Mail Results to Patient), and add your messages (if any). Click Verify & Next Patient.

Finish verifying your labs, then go to the Batch Sign tab.
Verify… Fields
(or, “if I type here, will this show up on the note?”)

Call Pt with Results: Shows up in the task which goes automatically to your nurse

Schedule Results F/U: Shows up in the task which goes to the front desk

Message to Staff: Shows up in the task to your nurse AND on the note to the patient

Message to Patient: Shows up in the patient note
Using the Batch Sign tab is a faster way to sign off on your notes/scanned documents. Simply click on the patient’s name on the left, and the document opens on the right. You can choose to Sign or Edit. Clicking Sign simply signs the document, and then pulls the next document into the queue.
Clicking Edit takes you into the Edit mode of the chart. If the note is signed here, when you navigate back to the Batch Sign tab, if the task for that patient hasn’t dropped off automatically, click the Refresh button.

You will need to Edit to fill in the Attending Note form if necessary.
Signing Notes – Batch Sign

The number and type of documents that need to be signed for each patient will show at the top of this section.
As more and more of our doctors are taking advantage of the CC functionality in the notes, you may have seen some Review Document tasks. These are notes that other MEAC/Family Medicine providers have sent for review.

From the Batch Sign tab, clicking “Done” will stamp the note as having been reviewed by you.
Now, when you click on your Task List, it should be much more manageable, as most of the auto-generated tasks should have already been completed.