Worklist

Reviewing the types of worklists, functionality, and customization

Empowering Extraordinary Patient Care
Today’s presenters:

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Your phone has been automatically muted. Submit questions here during the webcast.
What will we cover today?

- Define the Worklist
- Distinguish between the two types of worklists
- Review the delivered Worklists & common customized Worklists
- Identify all build items that control Worklist functionality & display
- Review how to setup a Worklist
- Demonstrate basic functionality of a Worklist
- Review actions performed within each type of Worklist
What is a Worklist?

- a workspace containing order and result items
- most commonly used to see items that need an action performed before they can be completed
  - e.g., items in a state/reason of needs information or needs verification/authorization
Two Types of Worklists

Patient-Centric
- A list of order or result-related items that apply to one specific patient
- An individual component of the Clinical Desktop

Cross-Patient
- A list of order or result-related items that apply to multiple patients.
- This workspace is located in the vertical/horizontal toolbars.
Patient-Centric
Cross-Patient

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Location</th>
<th>Status</th>
<th>L/S Last U</th>
<th>Oldest Item</th>
</tr>
</thead>
<tbody>
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<th>Status</th>
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**CBC**

<table>
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<tr>
<th>Test</th>
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<th>Reference</th>
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<tr>
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<td>123 Kimm3</td>
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<td>RBC</td>
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How are Tasks different from Worklist Items?

**Tasks**
- allow for up to 4 filters
- may or may not pertain to an order or result
- assigned to an owner
- follow up with any remaining Task List items after checking worklist

**Worklist**
- a task can be a reminder that a Worklist item exists, but the inverse is not true
- May pertain to orders/results
- provide 18 filter tab types
- a query builder around Orderable Items
- linked to a specific order or result
- assigned to a view to be worked by one or more users
- check the Worklist first
Provider
- Order-Result Management
- Order-Result Group Coverage
- Abnormal results
- Denied Financial Auth Order

Midlevel & Resident
- Order-Result Group coverage
- Abnormal Results
- RV Requiring Supervision

Clinical Staff
- Overdue Orders
- Orders Requiring FU
- Meds/Immun Requiring Attention
- Specimen Collection

Front Desk/Clerical Staff
- Orders Requiring FU
- Financial Auth
Worklist View Editor Layout: Controls

The Worklist View Editor window that opens when you select the icon on the Worklist tab.

- User/Enterprise
- Manage Views For:
- ‘Copy To…’
- Apply, Ok, Cancel
Worklist View Editor Layout: Add/Edit Views tab

- Display Unverified Items for Current Patient
- Default to Current Patient Only in Patient Worklist
- Default Display Mode radio buttons
Choosing the right filter drives how you sort your ‘bucket’ of orders and results

- 18 available filters
- customize a view specific to your role
  - optimize your daily workflow
- Users are not required to utilize every filter
Notable Filters: Filters containing ‘current provider’ checkbox

- 5 filters include a “current provider” checkbox
- Example: the view will show items for which the current provider was the performing provider, authorizing provider, etc.
Notable Filters: Order Status Reason

- “Review by Current Provider” checkbox
- include items that require review
- Also, include certain unverified items
Notable Filters: Sites

- “Current Site” checkbox
- If a site is not selected, then the view does not filter based on this item
Notable Filters: Misc

- Display Items in Current Organization Only
- Display Overdue Important Only
- Days Overdue
- Days to be Done
- Days to Expire
- Patient Waiting N Minutes
- Miscellaneous Sort does not function before v11.2.3 hf 3
Creating an enterprise view

- Worklist View – Edit security
- Worklist View – Administration
- TWAdmin > Work Def Admin > Worklist tab > Worklist View Editor window

“You spelled ‘confidential’ wrong.”
Recommended Worklists by Role

**Provider**
- Order-Result Management
- Order-result Management-Group Coverage

**Clinical Staff**
- Clinical Staff Items
- In House Orders

**Front Desk**
- Check Out Items
- Financial Auth Orders
- Denied Financial Auth Orders

**Surgery Scheduler**
- Surgery Scheduling

**Office Manager**
- Overdue Orders
- Outstanding Orders
- Financial Auth Orders
- Denied Financial Auth Orders
Scenario One

- An OBGYN practice orders different radiology and labs for their patients but only wants to track the patient’s Mammograms. At the end of every month, the manager receives a report of all Mammograms that have been ordered. She then calls the patients to follow up on the status of their Mammogram. She would like a way to track these in the EHR.
Now let’s go into the application!
Scenario Two

- A hospital has three affiliated practices. The scheduler at the hospital schedules all referral appointments for the three associated practices. He needs a Worklist view that displays all of the referral orders on hold for scheduling that were placed at these three practices.
Now let’s go into the application!
Scenario Three

The organization would like Worklists setup by role to be used during the patient visit.

- **Create a In-house Orders Worklist** which will hold all in-house lab procedure orders that need to be worked by the clinical staff during the visit.
  - In House Orders – Active status, but Commun Method = Perform Order
- **Create a Check Out Worklist** which will hold all orders that need to be worked by the staff at check out
  - Follow-up and Imaging Orders on Hold for Scheduling
Now let’s go into the application!
Manage Personal/Manage Enterprise tab

- This radio button determines how this tab renders
  - ‘Manage Enterprise’
  - ‘Manage Personal’
- The current user can assign enterprise views as personal
  - also allows them to set default view
- Use SSMT to upload Worklist views & assign to specific users
Cross-Patient Worklist Controls

- View
- Sort
  - Enables you to sort by Patient Name, Location, Status, L/S Last Updated & Oldest Item Updated
- Refresh Icon
- Expand Icon
  - Expands/contracts all data items within component
- Edit View Icon
- Filter
- New Task Icon
Things to Remember When Setting Up Your Worklist

Preferences
• Encounter selection worklist
• Encounter type worklist
• Maximum number of seconds to allow for worklist load
• Workspace view task
• Worklist Navigation After Authorize or Void
• Hide the grid header from result display in worklist
• Result Verification Navigate After Review
• Result Verification Navigation after QVerify

Security
• Worklist View – Edit
• Worklist View Administration
Overview

• A worklist is a workspace containing order and result items
• There are two types of worklists
  – Cross-patient & patient-centric
• Worklists and tasklists are not the same thing
• You can create new worklist views in the Worklist View Editor
  – These views can be assigned in the Worklist View Editor & through SSMT
• Choosing the right filter drives how you sort your ‘bucket’ of orders and results
Q & A

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