

# Managing Hub referrals – Task List

## What is it?

- Task list is where the Discharge hub team will find all completed hub referral forms that need to be reviewed.
- Follow-up reviews can also be accessed from the list.

#### Setting Task List up

#### In Powerchart

1. Select Task List.

Task	c Edit	View	Patient	Record	Links	Notifications	Navigation	Help	p		1			
	Home 🌃	Ambul	atory Orga	niser 🛄 D	liary 🛓	Short Patient List	CareCon	npass	Doctors Worklist	🔐 Task List 🖠	Cunca	al Ward Summary	Detailed Patient List	👫 Discharge Summary
<b>3</b> ].	Exit 📭 D	epart 📕	Calculato	or 🙀 AdH	loc 🔏 F	PM Conversation	• 🧟 Collect	ions Ir	nquiry 🔄 Communic	ate 🕶 iAware	🛃 Capa	icity Management	IIIII Medication Administ	ration 🕠 Discharge Me

2. In Task List your settings will decide which tabs you see, each tab can be configured for a different purpose. Select a tab you want to set up ideally **Referrals**.

Task List									
	1 1%								
FHDUMMY, Assigned Ta	sks								
Transfusion Laboratory	Medical	Patient Care	Referrals	Contacts	Contacts	Screening	Dispensing	Outpatient	

- 3. Select **Options**.
- 4. Select Task Display.



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- 5. In the opening window, in the **Status** column, place a tick in the **Pending** box.
- 6. In the **Time Parameters** column, ensure a tick is placed in the **Scheduled** and **PRN** boxes.
- 7. In the **Task Types** box ensure you have the following highlighted blue and they are showing in the **Chosen Task Types** box:
  - Follow up Review Discharge Hub Referral
  - Review Discharge Hub Referral
  - Remove any previous selected Task types showing in the Chosen Task Types box which are not the above two, by clicking on them in the **Task Types** box.
- 8. Click Save then OK.

P Viewing: Referrals					×			
Status		Time Parameters		Medications				
□ All		□ All		All Medications				
Completed		Scheduled	6	□ IVs				
Pending Validation		🗹 PRN		TPN				
☑ Overdue	<b>5</b>	Continuous		Response				
Pending								
☑ In Process								
Discontinued/Cancelled								
Suspended								
Location Filters		Task Types						
No Location Filter			Find:	Chosen Task Types:				
u⊢⊠ All Locations		Electrodiagnostics Emergency Care Endoscopy Environmental Services EPOD EPOD Befarcal Follow up, Review Discharge Toreistic Services Keterral General Assessments General Assessments General Assessments General Assessments Heatology Heart Failure Contact Hepatology Heart Failure Contact Hepatology Home COVID-19 Screen Rev	quest	Follow up Review Discharge Hub Referral Review Discharge Hub Referral	8			
Original Settings				Save	e OK Cancel			

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- 9. Select Options.
- 10. Select Task List Properties.

Task Edit View Patient Record Links Notifications Task List	Options	
🚮 Home 🌃 Ambulatory Organiser 📰 Diary  🛔 Short Patient List 脳 CareC	Ta	sk List Properties
📲 Exit 🔝 Depart 📑 Calculator ं AdHoc 🍰 PM Conversation 🝷 🚾 Colle	Ta	sk Display
	✔ Or	der View
Task List	Tas	sk View
	Ta	sk-at-a-Glance Legend
	🖌 Na	vigator
Assigned Tasks	Sel	lect All
Transfusion Jahoratory Medical Dations Core Referrale Constants Core	De	select All
maisfusion caboratory medical Patient Care Referrais Contacts Cor	✓ Inc	dicators
Task retrieval completed	Au	tomatic Refresh

- 11. **Time Frames** is the default tab in the opening Task List properties window, from here you can set your preferred time frame:
  - Recommended default is the Defined Time Frame and the Current 24-Hour Shift - Overdue tasks will still appear in this view.
  - Selecting a Generic Time Frame allows a specific date range to be selected if looking for a missing task or performing audits.

⊙ De	fined Time	Frame (	g Hour Interva		e veric Time F	rame	
Rang O Pr O Cu O No	e evious urrent ext	24 Hour S	hift			1	
Show r	ne my: 🚺	2:00 ~	BST				
From:	01/04/202	2	0000	( Å ( ¥	BST		

Note – Your selected options will now be saved the next time you open Task List.

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12. Right click on Assigned Tasks and select Customise Patient View.



- 13. Click on Patient List tab.
- 14. Place a tick in the **Choose a Patient List** box.
- 15. Select **Departmental View** from the options:
  - This will let you see all tasks within the chosen timeframe and may load faster.
  - You can add location filters to only look for referrals from the Freeman (inc NCCC) or RVI.
  - You can also create specific focussed patient lists for the Freeman (inc NCCC) or RVI which will help you find specific referrals for either of the two hospitals – see How to add location filters for Freeman, NCCC and RVI guide.

16. Click Save.

17. Click **OK** to see the referrals pull through.

	1.0	Location F	ilters	
Choose a Patient List		<u> </u>	All Locations	1
		+	Cumberland Infirmary	
Departmental View	<u>^</u>	é.	Freeman Hosnital	
FH02				OSDI
RV33			SUNDERLAND ROTAL H	USPI
RV40		±	West Cumberland Infirm	hary
RV40 15		<u>ب</u>	Battle Hill Health Ctr	
RV34		÷	Berwick Infirmary	
FH16		÷	🖶 Biddlestone Health Cent	tre
RV42		÷	Cobalt NHS Treatment	
RV41			Dental Hospital	
FH05			Great North Children's H	losni
RV36				iospi
RV18ITU				
FH Day Treatment Centre		±…	Newcastle General Hosp	ital
FH10		<u>ب</u>	Newcastle Upon Tyne	
FH20		÷	👘 Nightingale Hospital No	rth E
FH13		÷	👘 North Tyneside General	Hos
FH37ICCU	~	<	16	>
		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		

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### 18. Open the **Review Hub Referral form** guide to complete a review of the form.

#### Note -

- Right clicking on a task allows Admin notes to be added to the task.
- These do not form part of the patient record but can be used to confirm useful details to help manage the tasks.
- This could be used to assign the task to a member of the team or to confirm if the referral has been added to the team's spreadsheet.

	Name	Record Done	в
	*ZZZTEST, EREC2701	Record Done (Date/Time)	
ୖୖୖୖ	01/Jan/80 *)	Record Not Done	
·····	*ZZZTEST, MALCOLM	Quick Record	
ଂପ	01/Jan/90	Record Details	
-		Unrecord	
ଝ	01/Feb/45	Ad Hoc Recording	
		Reschedule this Task	
		Print >	
		Order Info	
		Order Comment	
		Create Admin Note	
		Reference Manual	