



Setting Up and Using Work Lists



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Setting Up and Using Work Lists

If you've never used the Work List feature before, there is a small amount of set up required before doing so.

Set Up

1. From the CID menu bar, go to **Work with | System Tables**.
2. Click on the **Work Lists** table.
3. On the right side of the window do a **right-click | New**.
4. In the 'New Work List Entry' window, enter a **Code** of up to eight characters.
5. Enter the appropriate description in the **Work List** field (example: Lab Results, Prescriptions to Be Filled, etc).
6. Enter a work **List Code**. This code can be either alpha or numeric but must only be one character (for example 1, 2, 3, A, B, C, etc).
7. Click **OK**. Repeat steps 1 – 6 to create additional work lists.
8. *Optional:* If you would like to create Additional Data Fields for the Work List, click the Additional Data Fields table. Locate the Additional Work List Fields entry on the right and right-click on it and click **More Stuff**. Create the desired fields and click **Done** .
9. *Optional:* If you want a patient to be automatically added to a specific work list when a treatment code is entered into medical history, go to **Work with | Treatment List**. Double-click on the treatment and select the appropriate work list from the drop-down menu in the 'List Codes' field.
10. *Optional:* You may also have patients automatically be added to a specific work list when they are checked in. Make a note of the Code (not the List Code) of the Work List System Table Entry and go to **Work with | Hospital Setup**. Click the Advanced tab then click the Advanced Options button. Type the word "work" (without the quotes) in the search field. Click on "**Add Patient to Work List Code**". Click the Change Button beside the Default Value field below and enter the system table code for the work list. Click **OK** then close the window.

Using Work Lists

1. There are several ways to access the work lists from the Client Information Display (the CID).
2. Right-click in the Patient Area and click **Lists** and select the appropriate list. Click the **Clients menu** option and click **Work List**. Select the appropriate list from the drop-down menu in the Work List field.
3. Hit **Ctrl + Alt + F10** and then select the appropriate list from the drop-down menu in Work List field.

Adding Patients to Work List: To manually add a patient to a work list open the Work List using one of the methods described above. In the work list window, right-click and click **New** and it will add the patient to the work list.

Accepting a Work List Entry: The status of all new work list entries will show as **New**. When a staff member takes charge of an entry they can **right-click | Accept** and the Status will show as 'In Progress'

with that person's ID in the 'Who' field and it will be date/time stamped. You may also highlight multiple entries and accept them all at once.

Adding Additional Data Information: To add information to an additional data field setup on the Work List, double-click on the patient's name on the work list and the More Stuff fields will be displayed at the bottom of the window for you to enter data into.

Transferring and Removing Work List Entries: When you are finished with a work list task for the patient, you can either **right-click | Remove** the patient from the work list or double-click on the entry to open the change window and select another work list to transfer the patient to. You may also highlight multiple entries and perform either of these functions on all of the selected entries at once.

Posting Work List Entries to Medical History: You may post a work list entry to medical history if there are notes attached to the entry. You can also select multiple entries and post all selections at the same time. The medical history entry will have a code of WLIST\$, and the notes from the work list will be attached. The description will match what is setup in System Tables for the work list code. Once posted, the work list entry is ghosted.

Important Notes

Posting is now an undo-able function. However, when you go to Undo, it won't remove the entry that was posted into Medical History, but it will revive the work list entry. You'll need to manually remove it from Medical History.

Additional Data field information attached to Work List entries will not transfer to Medical History.

Renewing Work List Entries: If a staff member has accepted a work list entry by mistake, you can right-click on the entry and click 'Renew' to change the status to **New** which will remove the staff ID and date/time stamp. You may also highlight multiple entries and renew them all at once.

Additional Information

Like other windows in AVImark, you may customize the Work List view to include other column headings such as More Stuff. To setup a specific column heading in the Work List window, **right-click | View | Columns**. Type the name of the **More Stuff** field into the **Find** field. Click on the plus sign in front of the name then drag out the field called "Text" as the column heading.

As is true with other AVImark windows with this type of framework, you may sort the entries by clicking the column heading.

You may add notes to a work list entry by right-clicking on **Notes** on the entry.

The Work List window is a floating window which means you can keep it open and off to the side to make it easily accessible while continuing to work in AVImark. If the work list form is kept open, and a patient is opened on the CID, if the patient exists on the work list, then that patient will be selected automatically on the work list to match the patient on the CID.