Setting up and Using Work Lists Versions 2010 and above
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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. Go to Work With System Tables
2. Click the Work List 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 8 characters. Enter the appropriate description in the Work List field (example: Lab Results, Prescriptions to Be Filled, etc).
5. 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).
6. Click Ok. Repeat steps 1 – 6 to create additional work lists.
7. 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.
8. 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 Treatments. Double click on the treatment and select the appropriate work list from the drop down menu in the ‘List Codes’ field.
9. 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 parentheses) 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 however 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 AVLmark, you may customize the Work List window to include other column headings such as More Stuff. To setup a specific column heading in the Work List window right-click View. Columns then type the name of the more stuff field into the Find window, 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 AVLmark 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>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 AVLmark. 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.