



MMEEx User Manual

To-Do List

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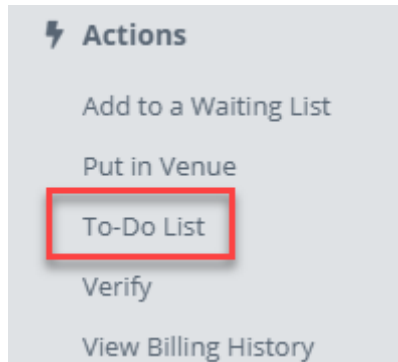
To-Do List

MMEEx includes a number of tools to prompt users to undertake patient related activities. One of these is the To-Do list



WORKFLOW TIP

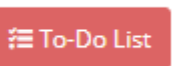
MMEEx recommends that you make it a habit to check the To-Do list every time you open the patient record. The To-Do list is located inside the patient record linked from in the Patient Widget.



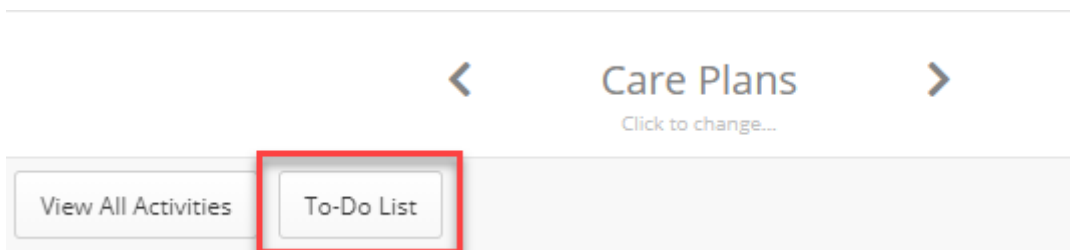
It can also be accessed via the patient demographic header, click on the To-Do List button. The button displays red if there are ANY care plan or to do list items overdue or due today.

Bunny, Bugs, Mr

0:24



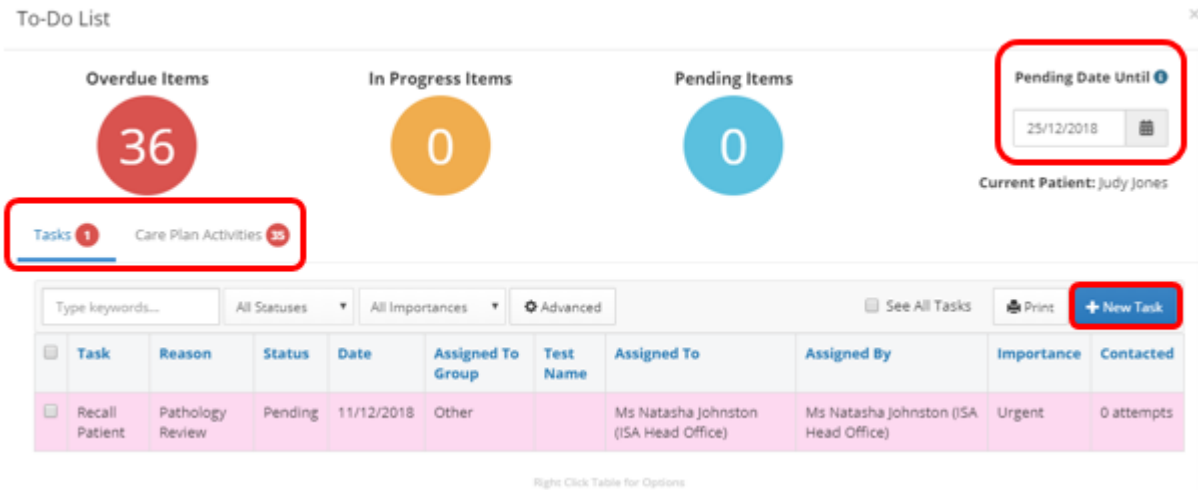
OR via the Care Plan Module



When the To-Do list opens you will be presented with a dashboard displaying

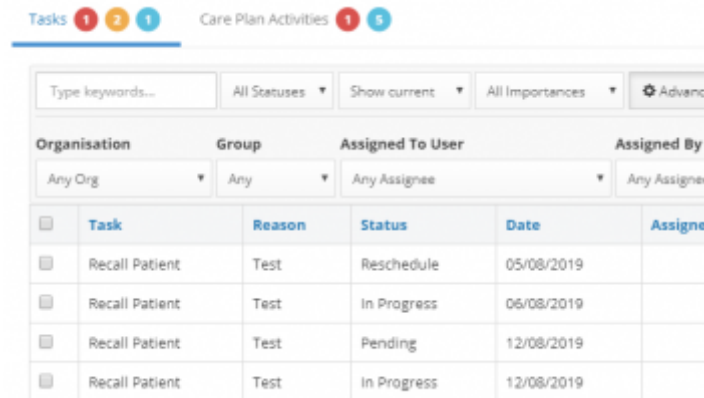
- The number of Activities (tasks and care plan activities combined) by status and colour within the pending period
 - Overdue - includes tasks and careplan activities that are overdue
 - In Progress - counts ONLY care plan activities that are in progress
 - Pending Items - counts ONLY care plan activities that are pending and will be due within the specified pending period.
- To-Do List Tab - a list of tasks that have been created for this patient that are now due

- The number icon indicates the number of overdue tasks and tasks due within the pending period
- The list will include all overdue and pending tasks.
- Care Plan Activities tab - a list of the overdue, in progress and soon to be due Care Plan activities
- Pending Date until - displays to 2 weeks into the future by default but can be edited if required
- **Add New Task** when on the Tasks tab
- **Add Activities** when on the Care plans Tab.



Tasks Tab

This screen will show only **Tasks** that have NOT been completed and relate to that selected patient.



To find out more about using tasks, click [here](#).

The task list count adheres to the following business rules:

Task Count Status	Due Date		Assigned Task Status (Manually assigned)
Overdue	Due date prior to today	AND	Status of <i>pending</i> or <i>reschedule</i>
In Progress	Due date at any time in the past, present or future	AND	Status of <i>in progress</i>
Pending	Due date of today or in the future	AND	Status of <i>pending</i> , <i>in progress</i> or <i>reschedule</i>

Task Count Status	Due Date		Assigned Task Status (Manually assigned)
Complete	Due date at any time in the past, present or future	AND	Status of <i>completed</i> or <i>rescheduled</i> *

NB: If a task that was in status reschedule, has been actioned (i.e. rescheduled to a different due date) and is now pending again (i.e. NOT complete) select the status of pending to indicate that the activity is yet to be completed.

The To-Do List button **turns red ONLY when there is an overdue TASK**. Care plan activity status does not impact the button colour.

Care Plan Activities Tab

This tab includes:

- *Add Activities* - ability to search for a task to add and complete as an ad hoc activity. This doesn't require the more complex *Add Activity* functionality that is needed to add a recurring activity.
- *Current Activities* - list of all overdue, in progress and pending activities within the *pending period*.
 - Sort by column
 - Search for specific activities
 - Expand the default 2 week pending date range to look for activities further into the future.
 - Select multiple activities by clicking on them, then click **Complete Selected Activities** to complete them from this list.

The screenshot shows a 'To-Do List' interface for a patient named 'Gugs Dunny'. It features three summary cards: 'Overdue Items' with a count of 27, 'In Progress Items' with a count of 1, and 'Pending Items' with a count of 0. Below these is a search bar and a table of activities. The table has columns for Name, Category, Privacy, Status, and Due Date. The first two rows are selected, and a 'Complete Selected Activities' button is visible at the bottom right.

Name	Category	Privacy	Status	Due Date
1 Monthly Review	Uncategorised	Visible to All	Overdue	16/02/2019
Activity with Immunisation activity Optional	Testing	Visible to All	Overdue	03/12/2018
Allahar	History / Education / Brief observation	Visible to All	Overdue	25/02/2019
AMF Education	History / Education / Brief observation	Visible to All	Overdue	14/01/2019
Audiology review	Medical Assessment	Visible to All	Overdue	11/10/2017
Body Mass Index	Observation	Visible to All	Overdue	03/02/2019
Echocardiogram	Radiology	Visible to All	Overdue	25/08/2018
Form 835 Medical	Paperwork to be reviewed	Visible to All	Overdue	11/10/2017
Generic hepatitis A vaccine	Immunisation	Visible to All	Overdue	03/12/2018

- Hover over the icon to see the activities that are required for this activity to be completed

The popup shows the title 'Immunisation' and a list item 'Generic Influenza' with a red 'Mandatory' tag next to it.

NB: Some activities may not be visible to you if you do not have the required user permission to see

them. If you feel you should be able to see activities that you cannot, please discuss with your organisation administrator