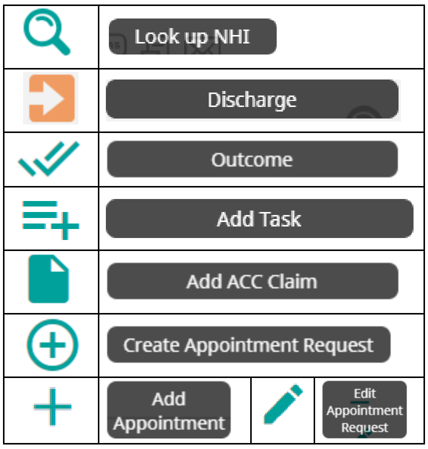
Worklists are central places to manage your workflow – everything happens from a worklist:



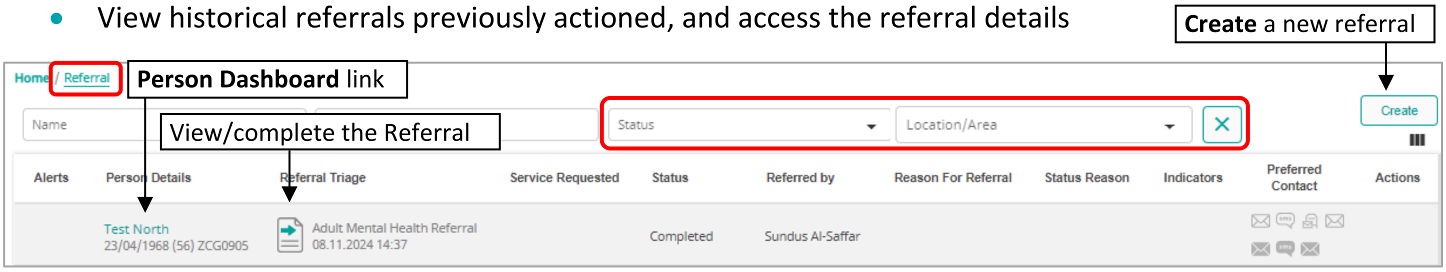
- Worklist visibility depends on your access and the records you need to view and work with
- All worklists have **Filter and Sort** options for fields relevant for the purpose of the worklist
- Click the Person Details link in in ALL worklists to open the **Person Dashboard** (clinical record)
- **Actions** in a worklist are displayed on the far right of each worklist – rest your mouse on each icon to view the action linked to the icon

Referrals

View all Referrals for an organisation (your Service/Organisation **Inbox**) and create new referrals

This is where I can:

- Create a new referral (top right)
- View new referrals into my service (filter by **Status** and **Location**)
- Action referrals (decide to forward the referral onto triage or not)
- View historical referrals previously actioned, and access the referral details

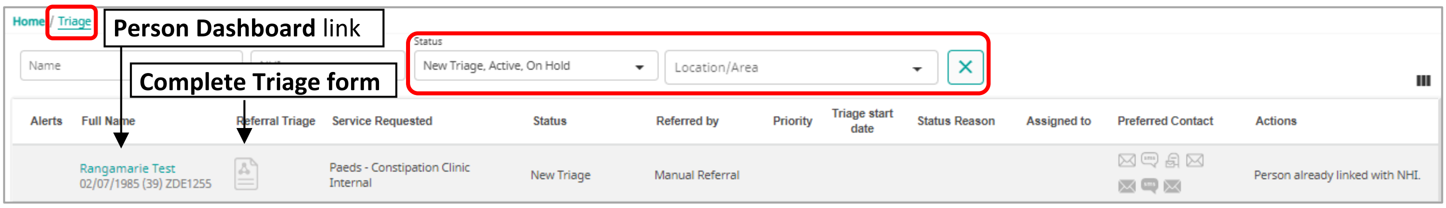


Referred Out Worklist

- View all referrals Referred Out from my organisation
- View current referral/triage status
- Access referral and triage details for these referrals

Triage

Completed Referrals for an organisation appear in the Triage worklist with a Status of **New Triage**, **Active** or **On Hold**. Referrals with a status of **Advice Given** or **Not Accepted** are also available through the Status filter. Once a Referral is Accepted or Redirected, it is no longer visible from this worklist.



This is where I can:

- View new referrals requiring triage for my service
- Action referrals (decide to accept the referral into my service or not)

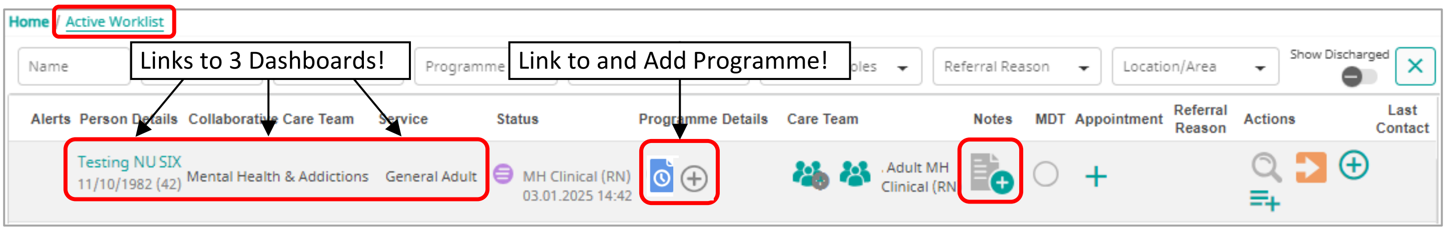
DAILY WORK

Depending on your organisation/service and role, these worklists may be available for your daily work:

Active Worklist

This is where I can:

- View and filter all accepted referrals with a Collaborative Care Team for my organisation/service
- Click links to a Dashboard: **Person Dashboard**, **Care Team**, **Service** and **Programme**
- Add a Person to a **Programme** Waiting list for your organisation/service
- View all **Notes** or Add a Note not linked to an Event
- Add Person to an **MDT** meeting
- Add an appointment OR **Create Appointment Request**
- Other **Actions**: **Look up NHI**, **Discharge**, Add a **Task**



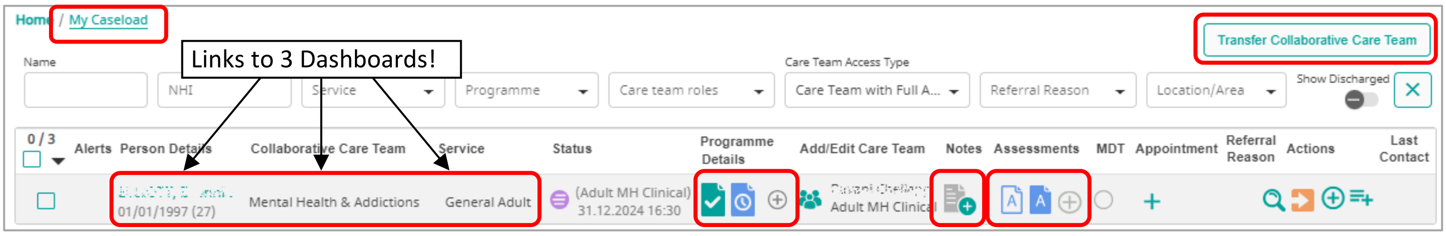
My Caseload

This is where I can:

- See all records where I am part of the Person's care team
- Transfer a Person to another care team member's My Caseload
- Jump to a Dashboard: **Person Dashboard**, **Care Team**, **Service** and **Programme**
- View all **Notes** and add **Notes** not linked to an Event
- View, Add, Save and Submit **Assessments**

Assessment colour coding:

Add new **Draft** **Submitted**

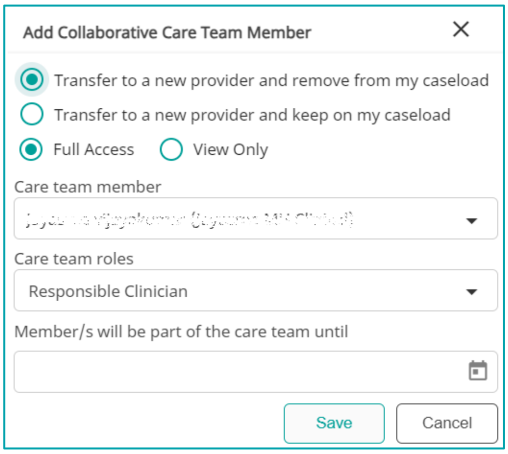


Transfer Collaborative Care Team

To transfer your caseload to another clinical person or to add another clinical person to the Collaborative Care Team temporarily, use **Transfer Collaborative Care Team**:

1. In **My Caseload**, select the records to transfer
2. Click **Transfer Collaborative Care Team**
3. Complete the screen and click **Save**

Date for removal from Care Team is useful when the Care Team Member transfer is temporary

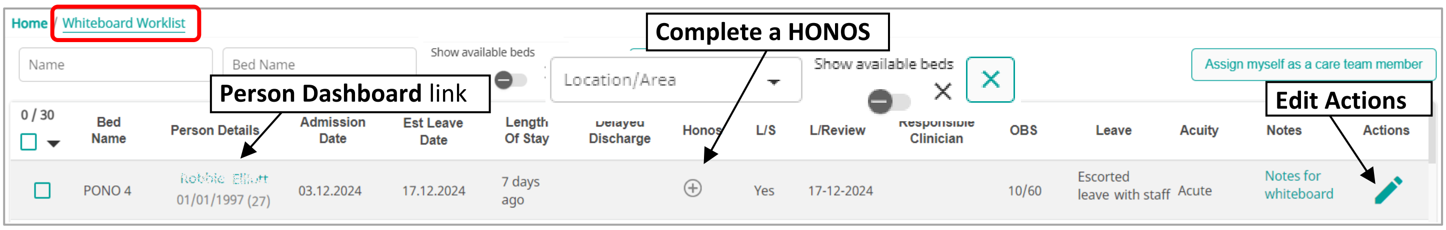


Inpatient > Whiteboard Worklist

Displays all records in your organisation/Service where a Person has been allocated a bed (see **Inpatient QRC**)

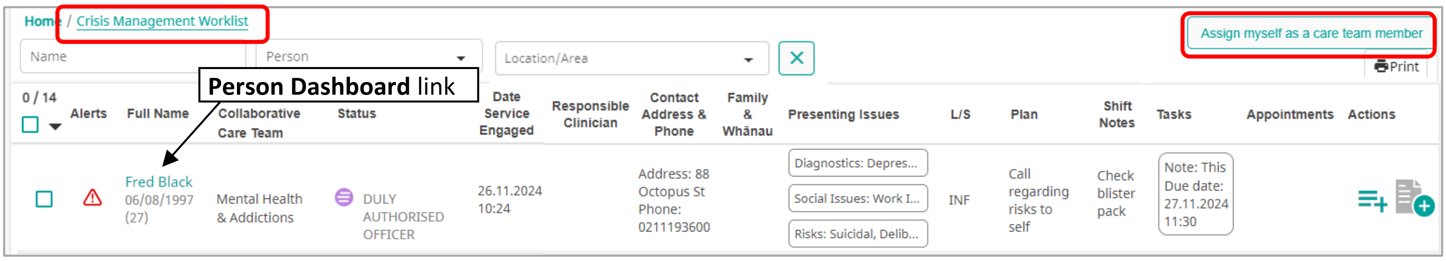
This is where I can:

- Complete a **HONOS** form
- Use the pencil to edit **Actions**



Crisis Management Worklist

Displays all records in the Acute Organisation/Service AFTER referral is Accepted and Crisis Care Team has been added (see **Crisis Management QRC**)



SPECIFIC WORK STREAMS

Depending on your organisation/service and role, these worklists are available for specific streams of work:

Programme Worklist

Displays all records allocated to a Programme in an Organisation/Service AFTER referral is Accepted and Care Team allocated (see **Person Dashboard QRC**)

- You can open the **Person** OR **Programme Dashboard**

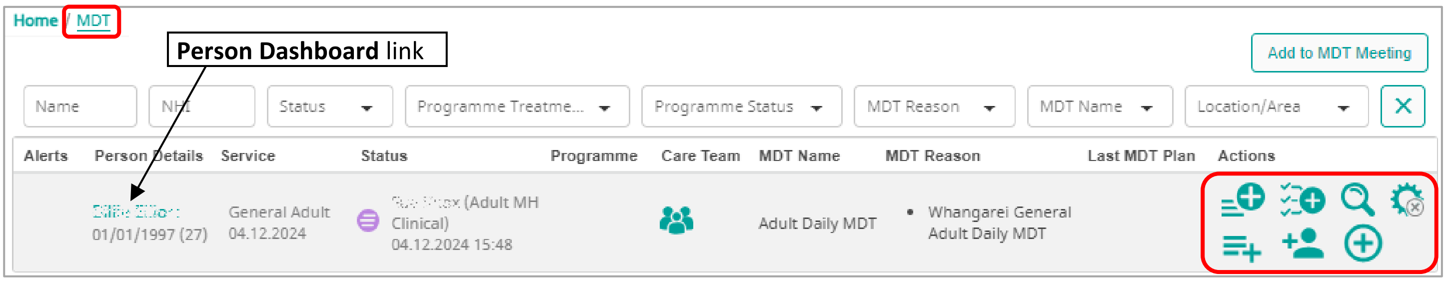
Programme icons:

Waiting list **Active** **Discharged** **Declined**

MDT

Displays records of those added to an MDT meeting in an organisation (see **MDT QRC**)

- Record MDT details, then select an Action to remove a record from the MDT list



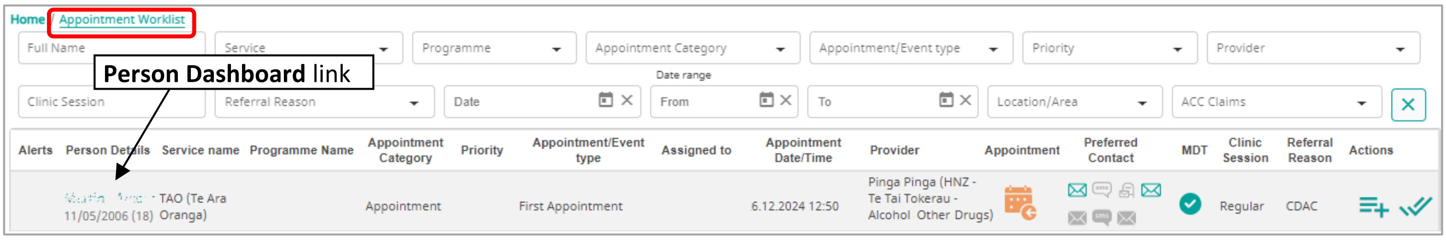
APPOINTMENTS

See **Appointments and Clinics QRC**

Appointment Worklist

This is where I can:

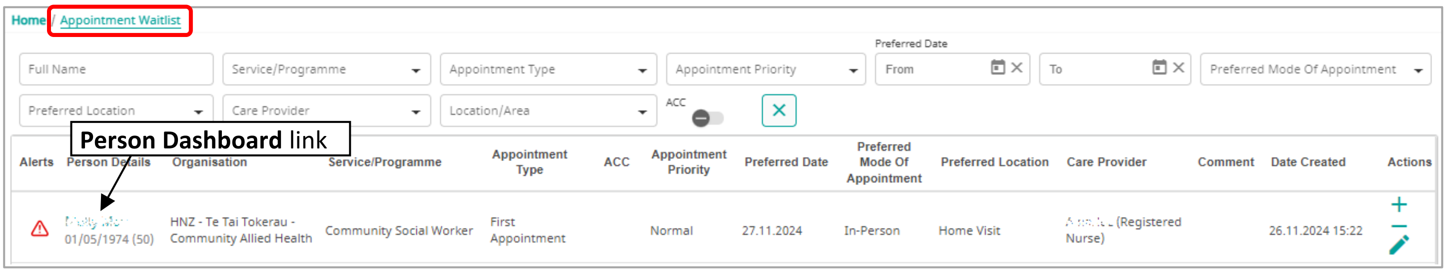
- Add a **Task** and/or an **Outcome**, from **Actions**



Appointment Waitlist

This is where I can:

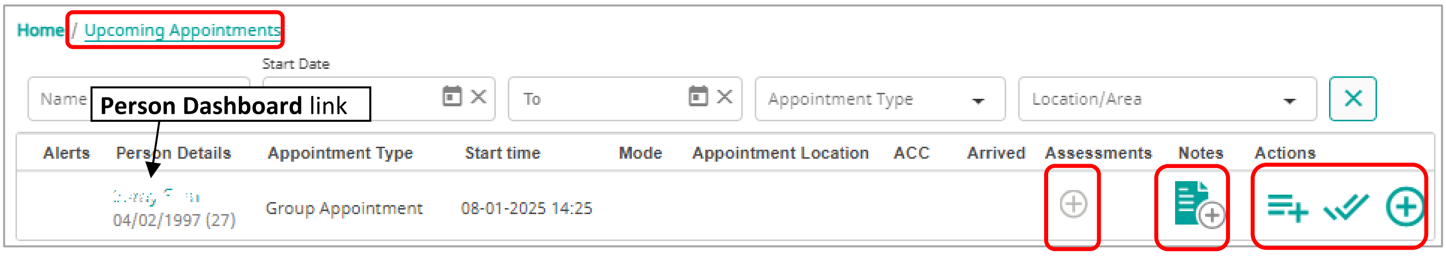
- **Add** an Appointment, **Remove** Person or **Edit** Appointment request, from **Actions**



Upcoming Appointments

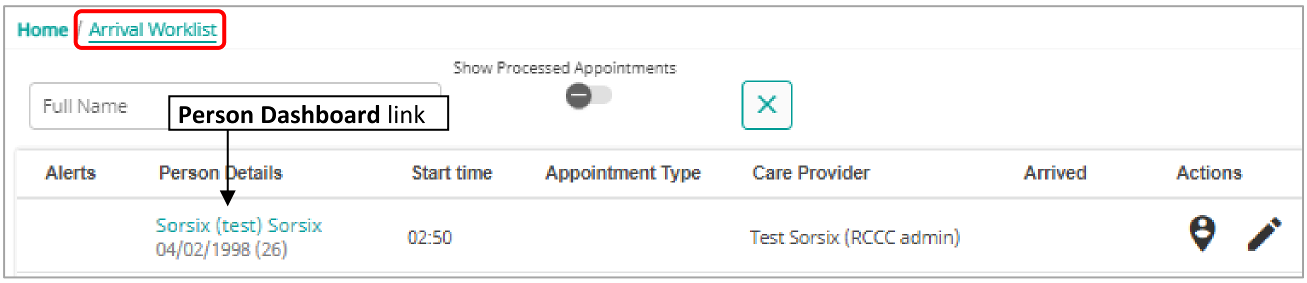
This is where I can:

- View ALL **Assessments** and **Notes**, and add Assessments and Notes not linked to an appointment
- **Actions:** Add a **Task**, **Outcome** of the appointment, or create an appointment request



Arrival Worklist

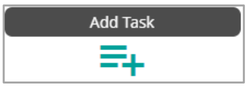
- Available for Receptionists and some other relevant positions
- Record Arrival



OTHER WORKLISTS

Tasks

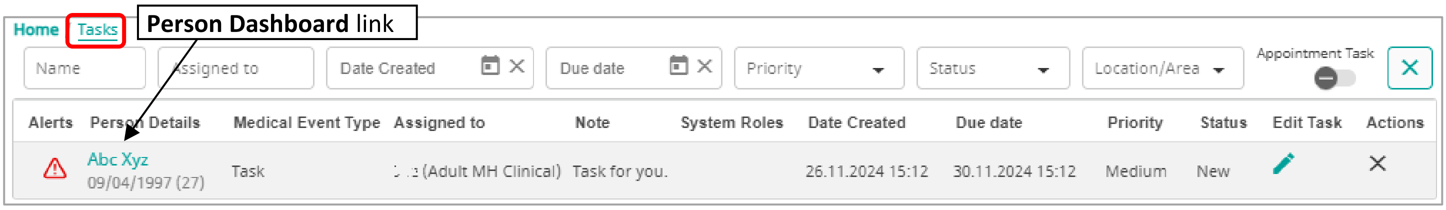
View Tasks assigned to YOU. Those with Admin roles can view tasks assigned to everyone in the organisation/service.



- Tasks are added from the **Active Worklist** or **My Caseload** (and others), under **Actions**

This is where I can:

- **Edit** a Task to record progress and change the status
- **Decline** a Task (under **Actions**)

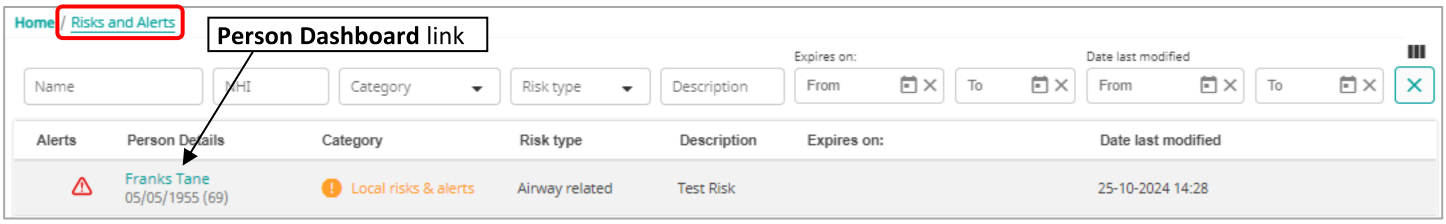


Risks and Alerts

- Risks and Alerts are added from the **Person Dashboard**

This is where I can:

- View and filter current Risks and Alerts



ACC Claims

View records in your organisation/service with an ACC Claim recorded in MyWai

This is where I can:

- Click **Visits** to view this Person's visit history
- **Edit** the ACC Claim details recorded in MyWai, download to PDF and View Audit Log