



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

	Look up NHI
	Discharge
	Outcome
	Add Task
	Add ACC Claim
	Create Appointment Request
	Add Appointment
	Edit Appointment Request

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)

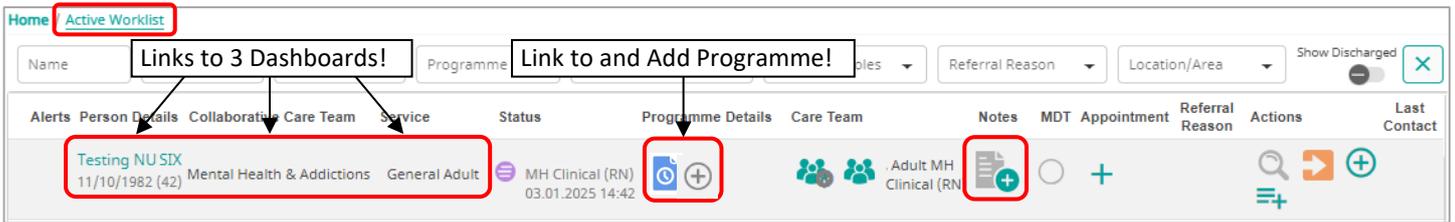
DAILY WORK

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:



Transfer Collaborative Care Team

[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**

Add Collaborative Care Team Member ✕

Transfer to a new provider and remove from my caseload
 Transfer to a new provider and keep on my caseload

Full Access View Only

Care team member
Jocelyn Wainman (MyComm MH Clinical) ▼

Care team roles
Responsible Clinician ▼

Member/s will be part of the care team until

Date for remove 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**

Home **Whiteboard Worklist**

Complete a HONOS

Person Dashboard link

Edit Actions

Name	Bed Name	Person Details	Admission Date	Est Leave Date	Length Of Stay	Delayed Discharge	Honos	L/S	L/Review	Responsible Clinician	OBS	Leave	Acuity	Notes	Actions
PONO 4		Robbie Elliott 01/01/1997 (27)	03.12.2024	17.12.2024	7 days ago		+	Yes	17-12-2024		10/60	Escorted leave with staff	Acute	Notes for whiteboard	

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](#))

Home / **Crisis Management Worklist**

Person Dashboard link

Assign myself as a care team member

Name	Person	Location/Area	Alerts	Full Name	Collaborative Care Team	Status	Date Service Engaged	Responsible Clinician	Contact Address & Phone	Family & Whānau	Presenting Issues	L/S	Plan	Shift Notes	Tasks	Appointments	Actions	
	Fred Black 06/08/1997 (27)			Mental Health & Addictions	DULY AUTHORISED OFFICER	26.11.2024 10:24		Address: 88 Octopus St Phone: 0211193600			Diagnostics: Depres... Social Issues: Work L... Risks: Suicidal, Delib...	INF	Call regarding risks to self	Check blister pack		Note: This Due date: 27.11.2024 11:30		

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

Home **Programme Worklist**

Person Dashboard link

Programme Dashboard link for Care Team Members

Name	Person	Service	Service Status	Programme Details	Group	Date Created	Date Enrolled	Date Discharged	Referral Reason	Actions
Test Blocker 15/03/1980 (44)	Te Roopu (TRW)	04.12.2024	None (Adult MH (Clinical)) 04.12.2024 15:11	Employment		04.12.2024 14:57	04.12.2024 15:00	04.12.2024 15:10		

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

Home **MDT**

Person Dashboard link

Add to MDT Meeting

Name	NPI	Status	Programme Treatment...	Programme Status	MDT Reason	MDT Name	MDT Reason	Last MDT Plan	Actions		
Test Blocker 01/01/1997 (27)	General Adult	04.12.2024	None (Adult MH (Clinical)) 04.12.2024 15:48		Adult Daily MDT	Adult Daily MDT	Whangarei General Adult Daily MDT				

APPOINTMENTS

See [Appointments and Clinics QRC](#)

Appointment Worklist

This is where I can:

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

Alerts	Person Details	Service name	Programme Name	Appointment Category	Priority	Appointment/Event type	Assigned to	Appointment Date/Time	Provider	Appointment	Preferred Contact	MDT	Clinic Session	Referral Reason	Actions
	Person Dashboard link TAO (Te Ara) 11/05/2006 (18) Oranga			Appointment		First Appointment		6.12.2024 12:50	Pinga Pinga (HNZ - Te Tai Tokerau - Alcohol Other Drugs)				Regular	CDAC	

Appointment Waitlist

This is where I can:

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

Alerts	Person Details	Organisation	Service/Programme	Appointment Type	ACC	Appointment Priority	Preferred Date	Preferred Mode Of Appointment	Preferred Location	Care Provider	Comment	Date Created	Actions
	Person Dashboard link Moly 01/05/1974 (50)	HNZ - Te Tai Tokerau - Community Allied Health	Community Social Worker	First Appointment		Normal	27.11.2024	In-Person	Home Visit	Ashley (Registered Nurse)		26.11.2024 15:22	

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

Alerts	Person Details	Appointment Type	Start time	Mode	Appointment Location	ACC	Arrived	Assessments	Notes	Actions
	Person Dashboard link Sorsix 04/02/1997 (27)	Group Appointment	08-01-2025 14:25							

Arrival Worklist

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

Alerts	Person Details	Start time	Appointment Type	Care Provider	Arrived	Actions
	Person Dashboard link Sorsix (test) Sorsix 04/02/1998 (26)	02:50		Test Sorsix (RCCC admin)		

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**)

Name	Assigned to	Date Created	Due date	Priority	Status	Location/Area	Appointment Task
Abc Xyz 09/04/1997 (27)	Task	26.11.2024 15:12	30.11.2024 15:12	Medium	New		<input type="checkbox"/>

Risks and Alerts

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

This is where I can:

- View and filter current Risks and Alerts

Name	Category	Risk type	Description	Expires on:	Date last modified
Franks Tane 05/05/1955 (69)	Local risks & alerts	Airway related	Test Risk		25-10-2024 14:28

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

Name	ACC Number	Primary/Secondary	Accident Date	Injury Description	Expiry Date	Short description	Status	Visits	Edit ACC Claim
Test Mother Nhi 22/02/1998 (26)	123	Primary		Full Injury Descrip...		Short Injury Description 1	Active		