

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

Home /	Referra	Person Das	hboard link								•
Nam	ne	View/co	mplete the Referral	Sta	atus	•	Location/Area		- ×		Create
Aler	ts	Person Details	Referral Triage	Service Requested	Status	Referred by	Reason For Referral	Status Reason	Indicators	Preferred Contact	Actions
		Test North 23/04/1968 (56) ZCG0905	Adult Mental Health Referral 08.11.2024 14:37		Completed	Sundus Al-Saffar					

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.

Home	(<u>Tr</u>	iage	Person Da	shboard	link	Status								
Nar	me		Comple	te Triage	form	New Triage, Activ	e, On Hold	▪ Location/Area			• ×			ш
Ale	erts	Full Na	ne	Referral Triage	Service Requ	uested	Status	Referred by	Priority	Triage start date	Status Reason	Assigned to	Preferred Contact	Actions
		Rangar 02/07/1	narie Test 985 (39) ZDE1255	A	Paeds - Cons Internal	tipation Clinic	New Triage	Manual Referral						Person already linked with NHI.

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)



Q	Look up NHI
	Discharge
V	Outcome
=+	Add Task
	Add ACC Claim
Ð	Create Appointment Request
+	Add Appointment Call Appointment Request

Create a new referral

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

Но	me (/	Active Wo	rklist													
	Name	2	Links	to 3 Das	shboards	Program	me Link to ar	nd Add Program	nme! _{ole}	s 🔻 Re	ferral Rea	son	▪ Locati	on/Area	▼ Show	Discharged 🗙
	Alerts	s Person	Details C	ollaborative	Care Team	Service	Status	Programme Details	Care Team		Notes	MDT	Appointment	Referral Reason	Actions	Last Contact
		Testing 11/10/19	NU SIX 982 (42) M	ental Health	& Addictions	General Adult	MH Clinical (RI 03.01.2025 14:	N) 0 +	14 8	. Adult MH Clinical (RN		\bigcirc	+		Q 🔁	Ð
															1.1	

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

Home	My Caseload			Care Team Arress Type		(Transfer Collaborative Ca	are Team
		Programme 🔻	Care team roles 🛛 👻	Care Team with Full A	Referral Reason	▼ Locatio	n/Area 👻 Show Dischar	rged X
0/3	Alerts Person Details Collaborative Care Team Servi	ice Status	Programme Details	Add/Edit Care Team	Notes Assessments	MDT Appointme	ent Referral Actions Reason	Last Contact
	E.Le한가, 한 - 개하 01/01/1997 (27) Mental Health & Addictions Gen	eral Adult 🖨 (Adult I 31.12.2	MH Clinical)	E Store Chelleng Adult MH Clinical		• +	Q 🔁 🕀 🎫	÷

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

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

Add Collaborative Care Team Member	×
• Transfer to a new provider and remove from my cas	seload
O Transfer to a new provider and keep on my caseload	d
Full Access View Only	
Care team member	
jujau wa vijuyokomor (Jayaame 2014 Ofrikal)	-
Care team roles	
Responsible Clinician	•
Member/s will be part of the care team until	
Save	ncel

Assessment colour coding:

A

Draft

Submitted

(+)

Add new

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)

Nam	e / <u>Crisis</u> ne	Management \	Person	•	Locatio	on/Area		•	×				Assign	n myself as a care	team member
0 / 14	Alerts	Full Name	Person Da Collaborative Care Team	shboard link _{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 I 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 Worklist
Programme Dashboard link for Care Team Members

Name Person Dashboard link Programme Treatme Programme Status Referral Reason Location/Area X Alerts Person Details Service Service Status Programme Details Group Date Created Date Enrolled Date Discharged Referral Reason Actions Test Blocker Te Roopu (TRW) Social (Adult MH (Clinical)) O Employment 04.12.2024 04.12.2024 04.12.2024 15:10 Image: Clinical Structure	Hor	ne Pr	ogramme Workli	st		Program	me Das	hboard link	for Care Tea	am Members		
Alerts Person Details Service Service Status Programme Details Group Date Created Date Enrolled Date Discharged Referral Reason Actions Test Blocker Te Roopu (TRW) 04.12.2024 <td< th=""><th></th><th>Name</th><th>Pers</th><th>on Dashboard</th><th>link</th><th>ogramme Treatme</th><th>▼ Pro</th><th>ogramme Status</th><th>▼ Referra</th><th>il Reason 🔻</th><th>Location/Area</th><th>- X</th></td<>		Name	Pers	on Dashboard	link	ogramme Treatme	▼ Pro	ogramme Status	▼ Referra	il Reason 🔻	Location/Area	- X
Test Blocker Te Roopu (TRW) Social (Adult MH (Clinical)) O Employment 04.12.2024 04.12.2024 04.12.2024 15/03/1980 (44) 04.12.2024 04.12.2024 04.12.2024 04.12.2024 04.12.2024 04.12.2024		Alerts	Person Details	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	(Clinical)) 04.12.2024 15:11	C Employment		04.12.2024 14:57	04.12.2024 15:00	04.12.2024 15:10		Ð

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	Per	son Dashbo	ard link							Add to M	DT Meeting
Name	NH	Status	▼ Programme Trea	atme 🗸	Programme	Status 👻	MDT Reason 👻	MDT Name 👻	Lo	cation/Area	• X
Alerts	Person Details	Service	Status	Programme	Care Team	MDT Name	MDT Reason	Last MD	T Plan	Actions	
	5369 20001: 01/01/1997 (27)	General Adult 04.12.2024	Gue Shtax (Adult MH Clinical) 04.12.2024 15:48		*	Adult Daily M	• Whangan DT Adult Dai	ei General ly MDT		_0 ()0 ≡+ +	Q, ₿ ⊕
Te Tai To	kerau:		my	/wai@health	nalliance.co	.nz	0800 4M	YWAI – 0800 469	924	Te Who	itu Ora
02. MyW	'ai Worklists fo	r Workflow QR	С	17/03,	/2025			Page 3	of 5	Data an	d Digital

APPOINTMENTS

See Appointments and Clinics QRC

Appointment Worklist

This is where I can:

• Add a Task and/or an Outcome, from Actions

Home Appointment Worklist Full Name Service	✓ Programme	✓ Appointment Category	✓ Appoi	intment/Event type 👻 Prio	rity 🗸	Provider	-
Clinic Session Referral Reason	✓ Date	Date range	То	EX Location//	Area 🗸 ACC	Claims	• ×
Alerts Person Details Service name Programme Name	Appointment Category Priority	Appointment/Event type Assigned to	Appointment Date/Time	Provider Appointmen	t Contact MD	T Clinic Referral Session Reason	Actions
ेरिकर्मात - ⁵ राव्हा - 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

ŀ	Home /	Appointment Wait	list											
	Full N	lame	Service/Progra	mme 👻 Appo	intment Type	-	Appointm	ent Priority	Preferred 0 From	Date	• • ×	Preferred	d Mode Of Appointm	ient 👻
	Prefe	rred Location	← Care Provider	- Locat	tion/Area	•		×						
	Alerts	Person Details	Organisation	K Service/Programme	Appointment Type	ACC	Appointment Priority	Preferred Date	Preferred Mode Of Appointment	Preferred Location	Care Provider	Comment	Date Created	Actions
	♪	Mosty Morr 01/05/1974 (50)	HNZ - Te Tai Tokerau - Community Allied Health	Community Social Worker	First Appointment		Normal	27.11.2024	In-Person	Home Visit	Anolice (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

Home /	Jpcoming Appointm	ents							
		Start Date							
Name	Person Dashb	oard link	То		Appointment Type	e 🕶 🗌	.ocation/Area		• ×
Alerts	Person Details	Appointment Type	Start time	Mode	Appointment Location AC	CC Arrived	Assessments	Notes	Actions
	(<i>1.409)</i> ⊂ 10 04/02/1997 (27)	Group Appointment	08-01-2025 14:25				\oplus		≡+ √⁄⁄ ⊕

Arrival Worklist

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

Home Arriva	al Worklist					
		Show Pro	ocessed Appointments			
Full Name	Person Dashboar	d link	•	×		
Alerts	Person Details	Start time	Appointment Type	Care Provider	Arrived	Actions
	Sorsix (test) Sorsix 04/02/1998 (26)	02:50		Test Sorsix (RCCC admir	n)	9 🖍



OTHER WORKLISTS

Tasks

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

Add Task

• 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)

H	ome 1	asks Perso	n Dashboard lir	k								
	Name	ssig	ned to Date	Created 🖹 🗙	Due date	Priority	y 🔻 S	itatus 👻	Location/Ar	ea 🗸	Appointment Ta	ask 🗙
	Alerts	Person Details	Medical Event Type	Assigned to	Note	System Roles	Date Created	Due date	Priority	Status	Edit Task	Actions
	≙	Abc Xyz 09/04/1997 (27)	Task	🕽 . 2 (Adult MH Clinical)	Task for you.		26.11.2024 15:12	30.11.2024 15:12	Medium	New	1	×

Risks and Alerts

• Risks and Alerts are added from the Person Dashboard

This is where I can:

View and filter current Risks and Alerts

Home / <u>Risks</u>	and Alerts Persor	Dashboard link			Expires on:	Date last modified	III
Name	HI	Category 👻	Risk type 🛛 🔻	Description	From X	To	
Alerts	Person Details	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

Home / <u>ACC</u>	Claims Person Da	ashboard l	ink		•	Status			
Alerts	Person Petails	Acciden	Primary/Secondary Accident Dat	e Injury Description	Expiry Date	Short description Active	▼ ×	Visits	Edit ACC Claim
	Test Mother Nhi 22/02/1998 (26)	123	Primary	Full Injury Descrip		Short Injury Description 1	Active	≔	1