

Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

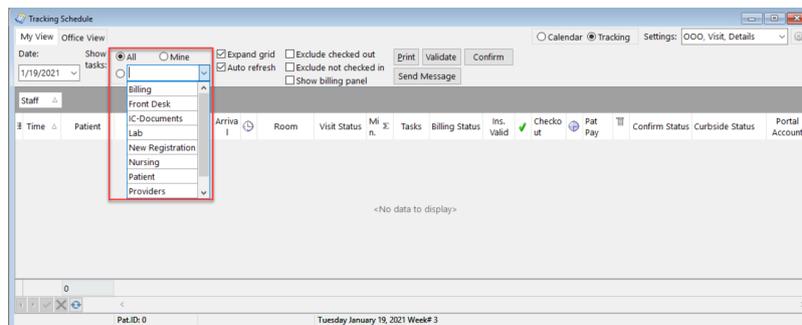
Tasks FAQs

Last Modified on 02/05/2021 4:06 pm EST

How can I only see my tasks on the Patient Tracking screen?

At the top of the Tracking window there is a section where each user can select what tasks they wish to see. The options are All, Mine, or select a department from the drop-down.

- **All:** All outstanding tasks are displayed.
- **Mine:** Tasks for the departments you are a member are displayed.
- **Department:** Tasks for the selected department are displayed.



How do I order task with due date in future?

You can create a task for a future date: on the Assessment/Plan tab of the note you can use the "Other Tab." It will appear on the Tracking Tab and on the Overview screen of the patient chart. You can also use the Task Tab on the Schedule/Practice Workflow to see the practice view of these tasks to see who has upcoming tasks.

Why do I see an outstanding task for Patient "0"?

A task referencing patient "0" (zero) may occur when there is a patient on an Instamed Portal Payment who's account number does not match in OP. It is best practice to research in Instamed Merchant Services directly to confirm which patient the payment should be associated to. Once the patient is confirmed, the payment can be applied appropriately.