

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Assign Default Tasks to Specific Departments

Last Modified on 01/02/2020 3:22 pm EST

Version 14.19

Utilities > Manage Practice > Departments

Overview

Task types such as Diagnostic Test, Vaccine, Referral Letter and Schedule are assigned to specific departments in the Checklist Template Administration form. Setting task types to default departments enables the Order Worksheet to function properly when assigning tasks to staff members.

Assign or Edit Task Types

- 1. Click the Utilities button on the menu toolbar.
- 2. Select Manage Practice.
- 3. Select Departments.
- 4. Click on the **Default Task Assignment** tab.

Department Management 🕞 💷 🔤							
Departments Default Task Assignment Teams							
+ - 🖊 💿 😒 🕏							
Department Name	ID	Color					
Billing	103	Green					
Doctor	2	Blue					
Front Desk	101	Purple					
Nurse	102	Yellow					
Patient	100	Color not selecte					
Referrals	104	Fuchsia					
			<i>.</i>				

- 5. Highlight the **task type** in the column on the left.
- 6. Select the correct **Department** from the Default Department drop-down menu.





0	Departments	Default Task Assignment			
Task Type		Task Type	Default Department		
	A/R Followu	ip	Billing		¥
1	Account		Billing		
	Asthma Plar		Doctor		
	Checklist		Front Desk		
Ĩ	Consent		Nurse		
	Dev Graphic	al	Patient		
ľ	Dev Narrativ	/e	Referrals		
	Diag Test		Nurse		

Version 14.10

Utilities > Manage Practice > Departments

Overview

Task types such as Diagnostic Test, Vaccine, Referral Letter and Schedule are assigned to specific departments in the Checklist Template Administration form. Setting task types to default departments enables the Order Worksheet to function properly when assigning tasks to staff members.

Assign or Edit Task Types

- 1. Click the Utilities button on the menu toolbar.
- 2. Select Manage Practice.
- 3. Select Departments.
- 4. Click on the Default Task Assignment tab.

lanag	ement						
Departments Default Task Assignment Teams							
D	Color						
103	Green						
2	Blue						
101	Purple						
102	Yellow						
100	Color not selecte						
104	Fuchsia						
	1anag ns ID 103 2 101 102 100 104	ID Color 103 Green 2 Blue 101 Purple 102 Yellow 100 Color not selecte 104 Fuchsia					

- 5. Highlight the task type in the column on the left.
- 6. Click on the dropdown button in the **Default Department** column and select the correct department.
- 7. Exit when finished.





Departments	Default Task Assignment			
Task Type		Default Department		
A/R Followup		Billing	~	
Account		Billing		
Asthma Plan		Doctor		
Checklist		Front Desk		
Consent		Nurse		
Dev Graphic	al	Patient		
Dev Narrativ	/e	Referrals		
Diag Test		Nurse		

