Office Practicum

View and Complete Patient Tasks

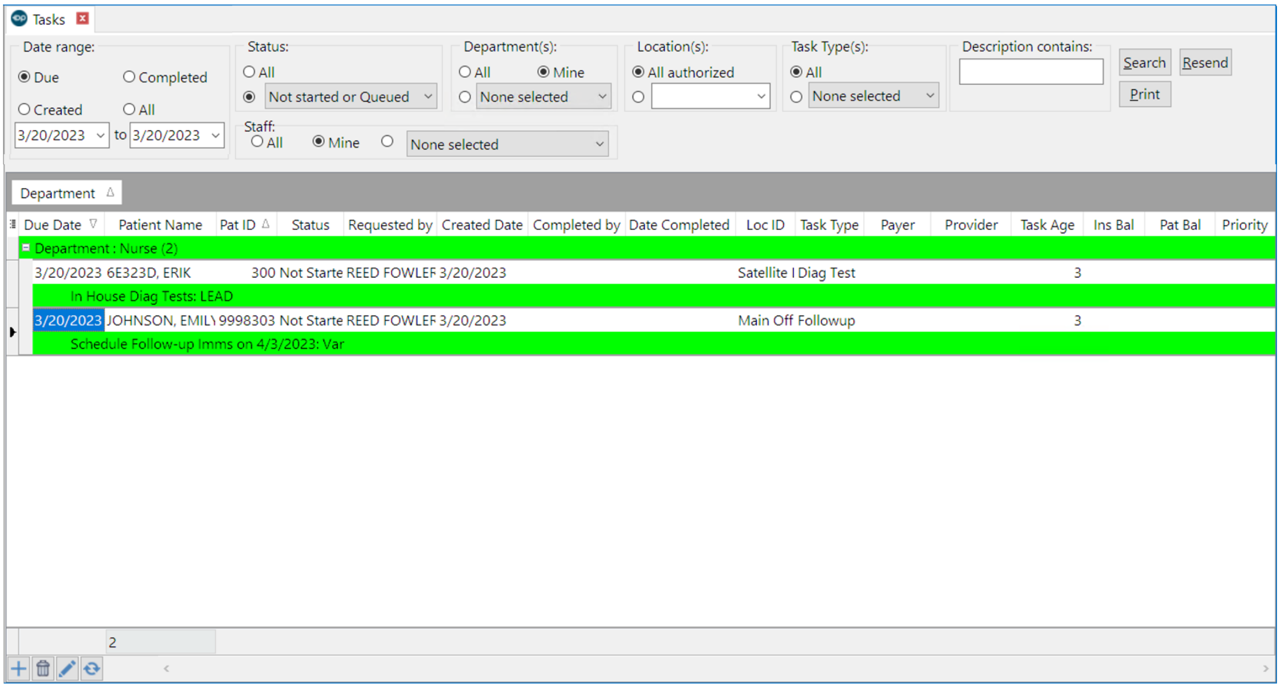
Last Modified on 07/26/2023 1:55 pm EDT

Version 21.1

Path: Clinical, Practice Management, or Billing tab > Tasks button

About

The Tasks window displays a list of patient Tasks, based on the selections made by the user in the Scope at the top of the window. From here, you can view and complete Tasks. By default, the window is organized by Department, but this grid can be **grouped**, **sorted**, and **filtered** by column header to group together similar Tasks making it easy to focus on one particular type of Task at a time.



Tip: If you want to focus only on tasks for a specific patient, that is best done from the Calendar and Tracking Schedules (if the patient has a scheduled appointment), the Tasks section of the Patient Chart, and from the Tasks and Care Plan Due Items panel of the Clinical Overview section of the chart.

View and Complete Tasks from the Task List

1. Navigate to the Tasks window: **Clinical, Practice Management, or Billing tab > Tasks button**
2. Use the Scope options along the top of the window to choose what Tasks are displayed in the grid.

- **Date range**: By default, the **Due** option is selected so that you're viewing Tasks by Due Date. The **Requested** radio button is available if you want to view Tasks by when they were created, or you can select the **Completed** button to view tasks by when they were completed. The **All** radio button allows you to view all tasks in the date range. Edit your date parameters by using the beginning and end date range fields.
- **Status**: Select the **All** radio button to view Tasks with all statuses or select the other **Status** radio button and use the drop-down to select the Status(es) you'd like to view.
- **Department(s)**: By default, the **Mine** radio button is selected so that you are only seeing Tasks that have been assigned to Departments that you are a part of. You can also choose to view **All** Tasks, or select the other **Departments** radio

button and use the drop-down to select the Department(s) whose Tasks you'd like to view.
- **Staff**: By default, the **Mine** radio button is selected so that you are only seeing Tasks that have been assigned to you specifically. You can also choose to view **All** to see Tasks that have been assigned to all Staff in the selected department, or select the other **Staff** radio button and use the drop-down to select the staff whose Tasks you'd like to view.
- **Location(s)**: By default, the **All authorized** radio button is selected. Select the other **Location** radio button and use the drop-down to select the Location(s) you'd like to view.
- **Task Type(s)**: By default, the **All** radio button is selected. Click the drop-down to select the Task Type(s) you would like to view.

3. If changes were made to the options above, click the **Search** button to refresh the Tasks grid.
4. *(Optional)* Click the **Show/Hide Columns** button located to the left of the column headers to select columns you want to include in the grid and deselect columns you don't want to see in the grid. Some of the most commonly selected Columns are: Patient Name, Pat ID, Status, Requested by, Created Date, Task Type, and Priority.
5. *(Optional)* Save your column selections by clicking the **Save Active Form** button located in the **Personalize** tab.

Tip: If you're trying to locate specific Tasks, enter search words into the **Description contains** field and click **Search**.

6. When you're ready to complete a Task, simply select it and double-click. You'll be taken to the area in OP for which the specific Task is completed.

Version 21.0

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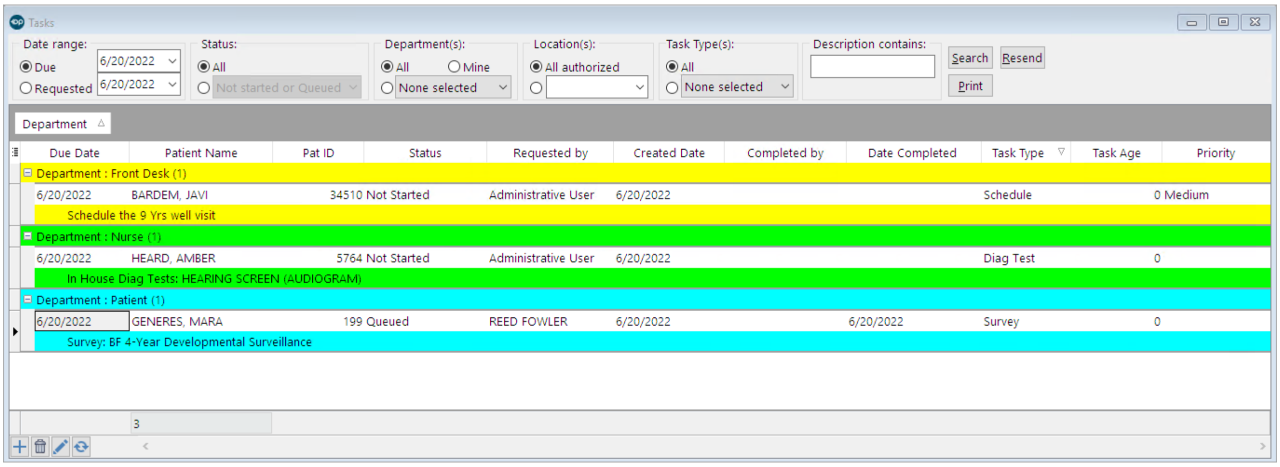

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