

Tasks

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Version 21.1

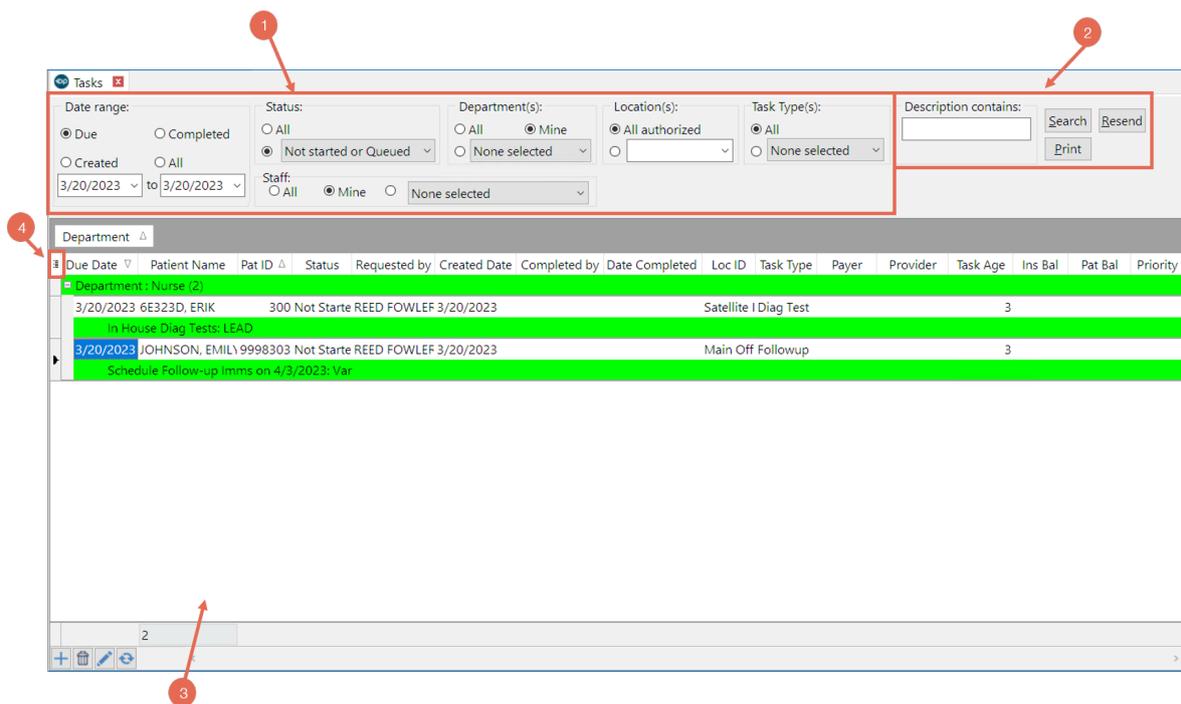


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Tasks

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

The Tasks window displays an overall list of patient Tasks. From here, you can view and complete Tasks. The columns displayed in this window are determined by what you select in the Show/Hide columns list (#4 below), so that the Task list can be customized according to each user's workflow or role in the Practice. Once the desired columns are added or removed, the logged-in user can **save their Active Form preferences**.



The screenshot shows the 'Tasks' window interface. Callout 1 points to the filter section at the top, which includes fields for Date range, Status, Department(s), Location(s), Task Type(s), and Description contains. Callout 2 points to the Search, Resend, and Print buttons in the filter section. Callout 3 points to the bottom toolbar containing icons for adding, deleting, and refreshing tasks. Callout 4 points to the 'Department' dropdown menu above the task list table.

Due Date	Patient Name	Pat ID	Status	Requested by	Created Date	Completed by	Date Completed	Loc ID	Task Type	Payer	Provider	Task Age	Ins Bal	Pat Bal	Priority
Department : Nurse (2)															
3/20/2023	6E323D, ERIK	300	Not Starte	REED FOWLEF	3/20/2023				Satellite I Diag Test			3			
In House Diag Tests: LEAD															
3/20/2023	JOHNSON, EMILY 9998303		Not Starte	REED FOWLEF	3/20/2023				Main Off Followup			3			
Schedule Follow-up Imms on 4/3/2023: Var															

Tasks Map

Number	Section	Description
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1	Task Scope	<p>The Task Scope options are:</p> <ul style="list-style-type: none"> • Date range: Tasks can be displayed based on Date Due, Date Requested (Date Created), Date Completed, or All. • Status: Select to view All Tasks or only Tasks with select Statuses. • Department(s): Select to view All Tasks, only your Tasks (Mine), or Tasks assigned to selected Departments. • Staff: Select to view All Tasks, only your Tasks (Mine), or Tasks assigned to selected staff members. • Location(s): Select to view Tasks for All authorized locations or a specific location. • Task Type(s): Select to view All Tasks types or only Tasks with the selected Task Type(s).
2	Task Search and Print options	<p>The Description contains field is used to enter a search term to locate Tasks that contain the term in the Task description. The Search button is used to conduct the search based on the selections made in the Task Scope (#1 above). A Print button is available to print the list as it is displayed.</p>
3	Tasks grid	<p>The Tasks grid displays the list of Tasks based on the scope criteria set at the top of the window.</p>
4	Show/Hide Columns button	<p>The Show/Hide Columns button displays a menu of columns that can be added or removed from the Tasks grid.</p>

Task Type Table

Selection	Description
A/R Followup	Task will launch the Claims section of the Patient Chart.
Account	Task will launch the Summary section of the Patient Chart.
Asthma Plan	Task will launch the Asthma Plan wizard.
Checklist	Task will create a checklist.
Consent	Task will open the Consents and Directives window.
Dev Graphical	Task will launch the Graphic Developmental Milestones.
Dev Narrative	Task will launch the Narrative Developmental Milestones.
Flow Chart	Task will open the Preventive Care Flow Sheet.
History	Task will open the History window.
Insurance	Task will open the Insurance section of the Patient Chart.
Message	Task will open a message window.
Records Request	Task will open the Event Chronology window.
Referral Letter	Task will open the Referral/Care Transitions Detail window. Entry of a patient referral is complete from this window.
Register	Task will open the Basic Information section of the Patient Chart.
Report	Task will open the Event Chronology window.
Scanning	Task will open the Input Scanned Items window.
Schedule	Task will open the Calendar.

Selection	Description
Vital Sign	Task will open the Vital Signs and Growth Measurements window.

Version 21.0

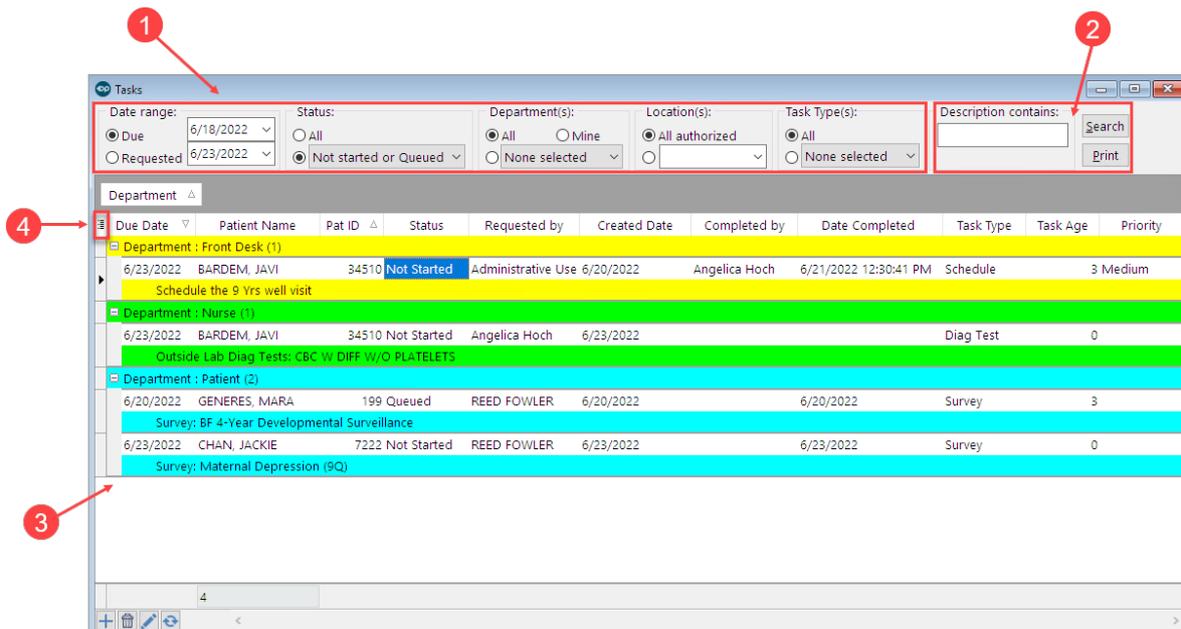


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The screenshot shows the 'Tasks' window interface. Callout 1 points to the filter controls at the top, including 'Date range', 'Status', 'Department(s)', 'Location(s)', 'Task Type(s)', and 'Description contains'. Callout 2 points to the 'Search' and 'Print' buttons. Callout 3 points to the main task list table. Callout 4 points to the 'Show/Hide columns' list icon on the left side of the table header.

Due Date	Patient Name	Pat ID	Status	Requested by	Created Date	Completed by	Date Completed	Task Type	Task Age	Priority
Department : Front Desk (1)										
6/23/2022	BARDEM, JAVI	34510	Not Started	Administrative Use	6/20/2022	Angelica Hoch	6/21/2022 12:30:41 PM	Schedule	3	Medium
Schedule the 9 Yrs well visit										
Department : Nurse (1)										
6/23/2022	BARDEM, JAVI	34510	Not Started	Angelica Hoch	6/23/2022			Diag Test	0	
Outside Lab Diag Tests: CBC W DIFF W/O PLATELETS										
Department : Patient (2)										
6/20/2022	GENERES, MARA	199	Queued	REED FOWLER	6/20/2022		6/20/2022	Survey	3	
Survey: BF 4-Year Developmental Surveillance										
6/23/2022	CHAN, JACKIE	7222	Not Started	REED FOWLER	6/23/2022		6/23/2022	Survey	0	
Survey: Maternal Depression (9Q)										

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