> 🔧 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.

Excluding Tasks from View

Last Modified on 01/02/2020 3:32 pm EST

Version 14.19

Overview

Tasks can be accessed from several areas of the OP software including the Patient Account and Patient Chart. Users can decide which which department's Tasks they want to view in the the Patient Account and Patient Chart and then save that view as a preference. The steps below will instruct you how to exclude Tasks assigned to specific departments from your view. For example, if you are Clinical Staff or a Provider, you may choose to exclude Billing Tasks from your view of the Patient Chart to reduce visual clutter and decrease the likelihood of important items being missed.

> 📌 **Note**: The steps below may also be applied to the Patient Account

To exclude tasks from the Patient Chart window:

1. Navigate to the **Patient Chart**.
2. If not already selected, click the**Overview** tab. The Tasks and Care Plan Due Items are displayed here.

Tasks and Care Plan Due Items:				
Task	Dept	Due Date	Status	
Sched f/u: 5 years	Front Desk	11/23/2018	Not Started	^
Active policy not valid	Billing	11/23/2018	Not Started	v

3. Hover over the **Dept** column header until a small filter icon 🔽 appears in the top right-corner of the header.
4. Select the **Department**(s) whose Tasks you wish to see (and proceed to the next numeric step).
   OR
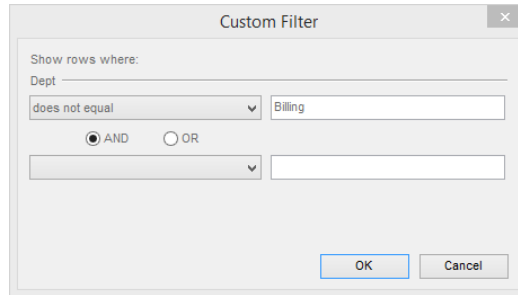   Select **Custom** to exclude a specific department. If selecting Custom, the Custom Filter

window opens (and follow the alphabetic steps below):

    a. Select **does not equal** from the Dept drop-down menu.
    b. Leave the default, **AND**, radio button selected.

> 📌 **Note**: Do not select**OR** when excluding departments.

    c. Enter the **department** in the corresponding white field (for example: Billing).

> 📌 **Note**: When using Custom, you must enter the Department name exactly how it appears in the software. For example, you must type Billing (with a capital B), not billing (with a lowercase b).

    d. Click the **OK** button to activate the Custom Filter and close the Custom filter window.

5. To save this view as a preference, click the**Pref** button on the smart toolbar.
6. Select **Active** to only apply the preference to this window.

Version 14.10

Overview

Tasks can be accessed from several areas of the OP software including the Patient Account and Patient Chart. Users can decide which which department's Tasks they want to view in the the Patient Account and Patient Chart and then save that view as a preference. The steps below will instruct you how to exclude Tasks assigned to specific departments from your view. For example, if you are Clinical Staff or a Provider, you may choose to exclude Billing Tasks from your view of the Patient Chart to reduce visual clutter and decrease the likelihood of important items being missed.

> ℹ️ **Note**: The steps below may also be applied to the Patient Account

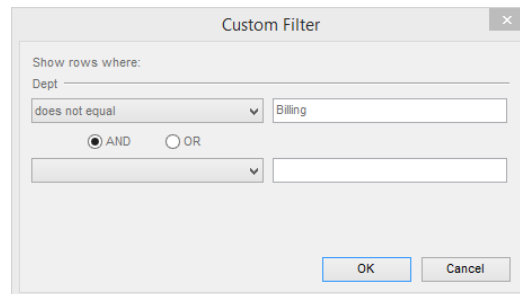To exclude tasks from the Patient Chart window:

1. Navigate to the **Patient Chart**.
2. If not already selected, click the **Overview** tab. The Tasks and Care Plan Due Items appear here.

Tasks and Care Plan Due Items:

Task	Dept	Due Date	Status
Sched f/u: 5 years	Front Desk	11/23/2018	Not Started
Active policy not valid	Billing	11/23/2018	Not Started

3. Hover over the **Dept** column header until a small filter icon ⊟ appears in the top right-corner of the header.
4. Select the Department(s) whose Tasks you wish to see (and proceed to the next numeric step).
   OR
   Select 'Custom' to exclude a specific department. If selecting Custom, the Custom Filter window opens (and follow the alphabetic steps below):

   a. Use the dropdown under Dept to select 'does not equal'.
   b. Leave the default, 'AND', radio button selected.

⚠ **Note**: Do not select **OR** when excluding departments.

   c. Enter the department in the corresponding white field (for example: Billing).

Custom Filter

Show rows where:
Dept
[does not equal ▾] [Billing]
( ) AND ( ) OR
[▾] [ ]
[OK] [Cancel]

⚠ **Note**: When using **Custom**, you must enter the Department name exactly how it appears in the software. For example, you must type Billing (with a capital B), not billing (with a lowercase b).

   d. Click **OK** to activate the Custom Filter and close the Custom filter window.

5. To save this view as a preference, click the **Pref** button on the smart toolbar.
6. Select **Active** to only apply the preference to this window.