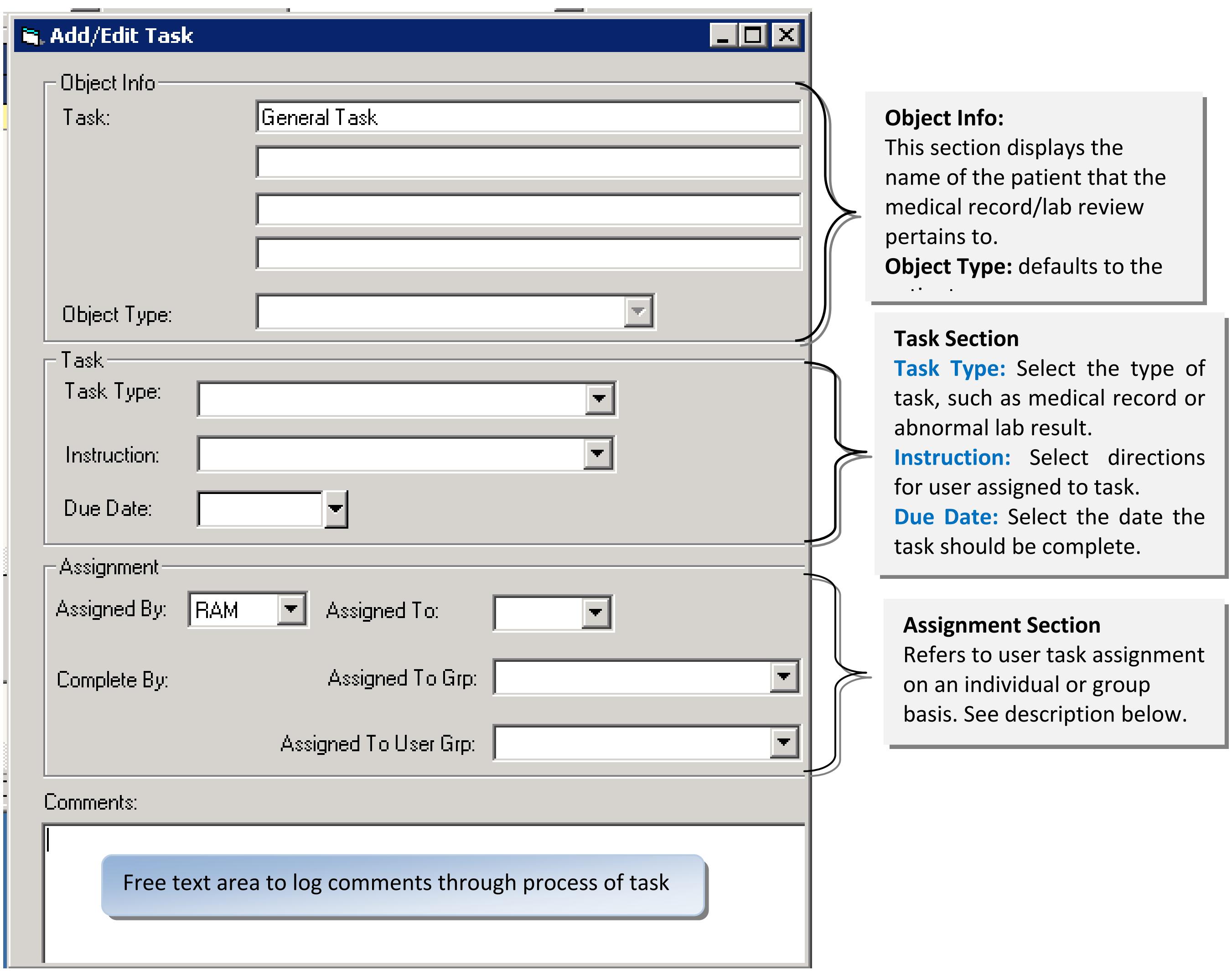
Task Manager

User & Admin Instruction

Tasks is an option under "Patient" on the main toolbar that allows a user to create a task for a specific user to review medical records or abnormal lab results. Once the task is created and assigned, it will be available in **Task Manager** (under "Tools" on the main toolbar) for the specified user to view.

Assigning a Task

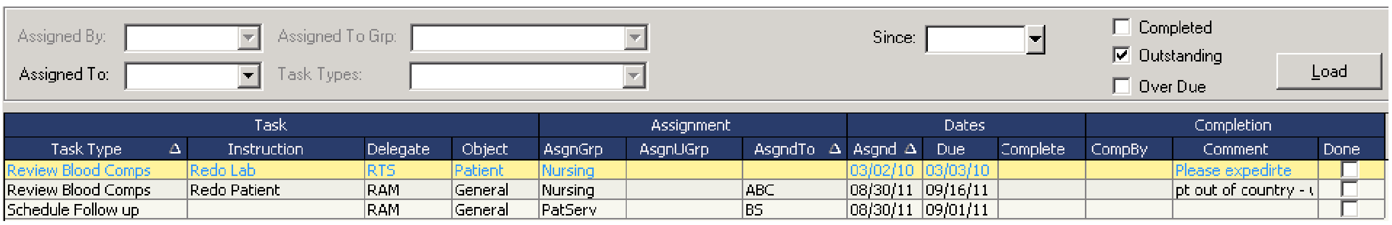
1. On the main toolbar, go to **Patient** and scroll to **Tasks**. The REsource Task Manager window will display.
2. Click the **Add** button. The 'Add/Edit Task' window will appear. Fill/Select necessary info in the provided fields. Please see below.



More Details on Assignment Section

- Assigned By: Automatically defaults with the user's initials that is adding or editing the task.
- Assigned To: Select the user's initials to which the task will be assigned.
- Assigned to Grp: Use this selection to assign a task to a particular group of users instead of just an individual user. Generally, these users are grouped by department or created to manage users' permission level.
- Assigned to User Grp: Use this selection to assign a task to a particular created group of users instead of just an individual user. These are custom made user groups created outside of the regular groups.

3. Once complete, click **OK.** This will return you to the Resource Task Manager window. The 'Task' you just created will display under the corresponding columns shown below:



Task				Assignment			Dates			Completion		
Task Type	Instruction	Delegate	Object	AsgnGrp	AsgnUGrp	AsgndTo	Asgnd	Due	Complete	CompBy	Comment	Done
Review Blood Comps	Redo Lab	RTS	Patient	Nursing			03/02/10	03/03/10			Please expedirte	
Review Blood Comps	Redo Patient	RAM	General	Nursing		ABC	08/30/11	09/16/11			pt out of country - ι	
Schedule Follow up		RAM	General	PatServ		BS	08/30/11	09/01/11				

> **NOTE**: The column definitions correspond to fields that are available when adding or editing a task.

To Edit a Task

1 – In the Resource Task Manager window, click the **Edit** button. The 'Add/Edit Task' window will appear.

2- Update and edit the task with the necessary changes by navigating through the selection fields.

3- Once complete, click **OK.** This will return you to the Resource Task Manger window. The changes you made to the task will display under the corresponding columns.

4- Click **Done** to exit out of the Resource Task Manager window.

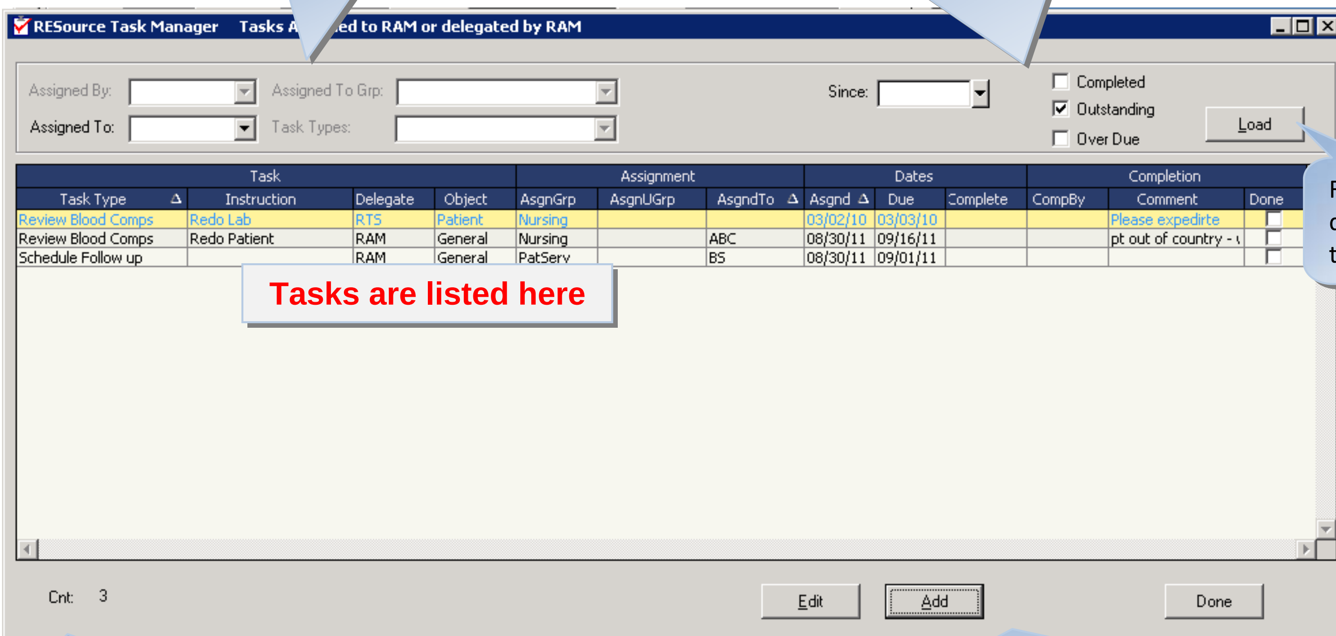
Managing Tasks

Resource Task Manager window will list tasks under a user under several scenarios:

1. If the task is assigned to her/him individually
2. If the task is assigned to a user group that the user is linked to
3. Any tasks that were delegated by the user

Assignment of tasks viewed/selected

Option to filter/ sort your tasks by:
Since: (the date)
Completed: tasks marked 'Done'
Oustanding: tasks not marked 'Done'
OverDue: tasks not marked 'Done' and passed due date



Refreshes data in the task list

This counts the number of tasks in viewing area

Done – click when finished using window
Add- click to add task
Edit – click to make changes on selected task. (To select task highlight it.)

NOTE:

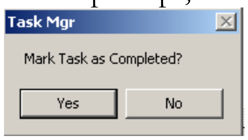
- The task list is designed to be sorted and organized in multiple fashions. Sorting options are at the top of the REsource Task Manager window. Make selections from the assorted fields to modify your search.
- Multiple filters will results in a more refined search. For example, the "Assigned To" field has user initials **ABC**, the "Since" field has **4/20/2010** selected, and the **Completed** option has been checked. This search criterion would yield all completed tasks assigned to ABC from 4/20/2010 to the present date.

Completing an assigned Task

1. Filter your task list by selecting outstanding and overdue tasks assigned to you.

2. Individually check off any tasks that you have completed in the "Done" column by clicking the check box.

3. At the prompt, click **Yes.**



Admin Setup

Creating a custom group for tasks

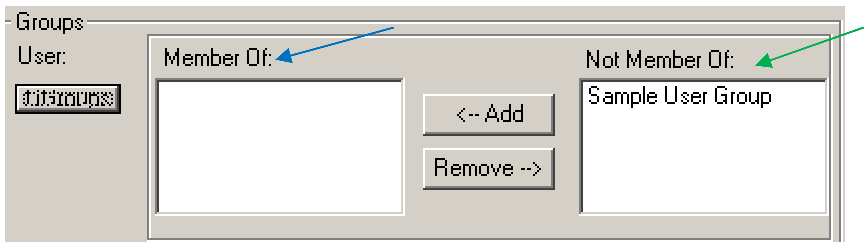
Only an administrator of certain permission level can create custom groups. If you do not have these permissions, please contact your administrator.

To create a custom group for Tasks:

1 – go to Maintenance – Admin – Lookup Table Manager, and select **GroupUserTbl** (should be first table in list)
2 – click **Append Row**
3 – enter next consecutive GroupID (if this is the first table entry then make it 1)
4 – enter GroupName
5 – enter GroupCat (create a group category – can be used for each similar group name, to organize)
6 – repeat for as many groups as necessary
7 – click **Update**

To assign users to a custom Group:

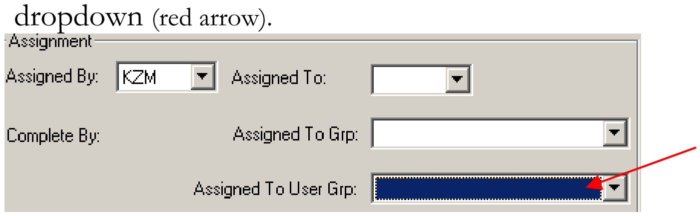
1 – go to Maintenance – Admin – User Manager
2 – select desired user and click **Edit**
3 – in the Groups section (middle left side of window), click the **UGroup** button
4 – from the new 'Not Member Of' (green arrow) box that appears, select the appropriate group(s) and click **Add** to move it to the 'Member Of' (blue arrow) box



5 – click **OK**
6 – repeat for any other users/groups

To assign a task to a custom Group:

- Create the task as usual
- In the Assignment section, select the desired custom group from the 'Assigned To User Grp' dropdown (red arrow).



- The task will appear for all members of that group

Other Admin Setup

Along with assigning user groups, there are certain tables that need to be addressed in order for drop down selections to be present for user.

- **lkupTaskObjectType for the "Object Type" field**
  When a user is assigning a task within a patient record, this field will default to 'patient'. However, an administrator can assign tasks outside of Resource in here as well. For example, an end of the day checklist to prepare the office for the next day (stocking, cleaning, ordering supplies, confirming appointments, etc).

- **lkupTaskType for "Task Type" field**
  Example of types are medical record review or abnormal lab result review.

- **lkupInstructionType for the "Instruction" field**
  Example of given instructions can be 'repeat test', 'schedule follow up', or 'Rx'.