**TASKS**

1. Choose "Task" from the vertical toolbar and "Task List" from the horizontal toolbar.

Banner will show patient associated with selected task (if task is patient related).

<table>
<thead>
<tr>
<th>Task</th>
<th>Patient</th>
<th>Assigned To</th>
<th>Created By</th>
<th>Created On</th>
<th>Status</th>
<th>ID</th>
<th>Due</th>
<th>MRN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign Note</td>
<td>DUMMY,CRASH Trial</td>
<td>Clinical</td>
<td>Trials,</td>
<td>04/21/2005</td>
<td>11:06</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Call Back</td>
<td>DUMMY,CRASH Trial</td>
<td>Provider, Reader</td>
<td>Provider,</td>
<td>06/13/2004</td>
<td>01:08</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notify Complete</td>
<td>DUMMY,CRASH Trial</td>
<td>Loder, Charles</td>
<td>Baker,</td>
<td>01/04/2005</td>
<td>10:44</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>03/01/2006</td>
<td>09:00</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>05/22/2008</td>
<td>12:35</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>05/10/2003</td>
<td>12:03</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>07/07/2002</td>
<td>02:38</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>07/07/2003</td>
<td>02:45</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doc Update</td>
<td>DUMMY,CRASH Trial</td>
<td>Update Paper CI</td>
<td>System</td>
<td>07/07/2003</td>
<td>02:46</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Personalize:** Allows the user to set various preferences and defaults.

**Task List Columns:** (User will have to scroll to see some of the far right columns.)

- **High Priority** - Urgent = Red Asterisks | ASAP = Yellow Triangle
- **Task Type** - Such as Sign Note, Authorize RX, Misc, Referral Follow-up, Phone Call.
- **Patient** - If the task is patient related, the patients name will show in this column.
- **Assigned to** - Shows the name of the person responsible for the task completion.
- **Created By** - Indicates who created the task.
- **Created on** - The date the task was created.
- **Status** - Active, In Progress, Complete, Inactive & Removed. The default view of "my active tasks" will only show tasks that are in the status of Active or In Progress.
- **ID** - Task ID used by the system.
- **Due Date** - When the task due date has passed, a red face icon will be displayed.
MRN - When task is patient related, the patient's MRN will show.

3 - **Comments** This area contains the message text. If the text is long, there will be a scroll bar to see the bottom of the text.

4 - **Task about** Various summary items regarding the task.

5 - **Action Buttons**

   - **Go To** - Available when the task has provided a link to a document or RX
   - **In Progress** - Changes the task status to “in progress”
   - **Done** - Changes the task status to “completed” and removes it from the Active task list.
   - **New** - Used to create a new task. (See section on creating New Task from Task List).
   - **Reply** - Creates a new task back to task sender (or other user).
   - **Reassign** - Used to Reassign a task to another user or team. To select multiple tasks; hold down the Control key while clicking on the tasks. Once all necessary tasks are highlighted click the REASSIGN button.

**Remove** - Used to remove task from Task List. To select multiple tasks; hold down the Control key while clicking on the tasks. Once all necessary tasks are highlighted, click the Remove button.

   - **Choose a Remove Reason from the drop down box**
   - **Fill in a Comment explaining reason for removing the task.**
   - **Click OK**
   - **Cancel button will cancel the task and return user to task list.**
**Copy to Note** - Used to copy the task details to a note on the patients chart. A screen will pop-up allowing attachment to a new note or inclusion in an existing note.

**Details** - Shows task details. Allows the user to make changes, add comments and/or send task to another user.

1) Click the History tab to see task history.

2) Type comments or make changes to task items. Click OK to save changes.

3) Send task to someone: Select a user to send the task to. Click OK button (The task will be sent and removed from task list).

**Original** - Shows the original task - for “notify” tasks only. (Notify task – Task that informs another user that a task is either complete or overdue).

**Print List** - Used to print the task list.

- Print dialogue box will appear
- Click PRINT PREVIEW button at the bottom of the screen
- (It may take a few minutes to bring up the preview).

When the preview button comes up, click the PRINT button at the bottom of the screen. The system will ask you to confirm that you want to print to the default printer. Click OK. To return to the task list; click CLOSE on the print preview window and Cancel on the print window. (The export button will allow user to place the task list into Excel).

**Print Task** - Allows the user to print a single task. Follow the instructions above for printing the task list.
Creating New Task - from task list

1. Click NEW button at the bottom of the screen

New Task Box will pop-up as shown below.

**Patient Task vs Other Task**

1. **Not about a patient**
   - Used for Personal Items or non-patient related Business tasks.

2. **Concerning patient TEST,CITY FIVE**
   - Will attach the task to the selected patient's record. (must have a patient in the banner to receive this option).

**Assign To**

Select User button

- Click drop down box to choose a recently selected user or click **All** to search users list
- Type in user's last name and click the GO button.
- From the results list; choose the correct user and click OK

**Task Type** - Click on the drop down box to choose the task type.
Choose the priority that will show to the recipient by clicking the priority drop down box.

**Priorities:**
- **ASAP** (displays as a yellow symbol in task view) - *48 hours* until overdue
- **Routine** - *one week* until overdue
- **Urgent** (displays as a red star in task view) - *6 hours* until overdue

**View:**
- **My Active Tasks**
- **View Desc...**

<table>
<thead>
<tr>
<th>Task</th>
<th>Patient</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous</td>
<td>DUMMY,CRASH</td>
<td>Godwin,Beverly</td>
</tr>
<tr>
<td>Follow Up</td>
<td>DUMMY,CRASH</td>
<td>Godwin,Beverly</td>
</tr>
<tr>
<td>Notify Complete</td>
<td>DUMMY,CRASH</td>
<td>Godwin,Beverly</td>
</tr>
<tr>
<td>Follow Up</td>
<td>DUMMY,CRASH</td>
<td>Godwin,Beverly</td>
</tr>
</tbody>
</table>

4 **Comments** - Click into the Comments box to type in the Task information.

5 **Activate Date / Overdue Date** - To change dates; choose the calendar icon next to the item.

**Activate:** 02 Sep 2004 12:38 PM

Click on the desired date.

*Activate dates set in the future will not show in recipient’s box until that date.*

6 **Notify Task** - Creates a task back to sender or designated person when task is completed by recipient or is overdue.

Choose either completed, overdue or both.
Select the user that will get the notify task.
Choose the priority to be displayed on the notify task.
When the task has been completed the chosen recipient will receive a notify task that will appear as follows:

7  **OK / Cancel** - Click OK button to create the task or CANCEL button to discard.

### Active Task List View

- **Banner will show last patient that was accessed, if any.**
- **To sort by the various fields; click on the column title.**
- **Screen Refreshes every 5 minutes; click here to refresh on demand.**

#### Creating New Task - from patients chart

1. Select a patient
2. Click on CHART from the vertical toolbar to bring up the patients chart.
3. Click on the chart item.
4. Click NEW TASK button from the bottom of the screen.
5. Some additional Task types are available when creating the task from the patients chart item:
Go To Note / Medical Problem or Complaint / Referral Follow-up / Review Document

These task types provide a link back to the chart item allowing the user to click GO TO from the task list to be taken directly into the chart item for quick access.

6. Complete the new task information. See previous instructions for completing new tasks.

**Navigating to the Document Sign Screen (for providers only).**

From the Vertical Tool Bar click on **Task**. From the Horizontal Toolbar click on **Documents**.

**NOTE AREA:**

If someone typed a task note for the document that requires signing; user may only see "Task Created" on the screen and will need to use the scroll buttons to read the message.