Quick Reference Guide - Task Sub-Areas

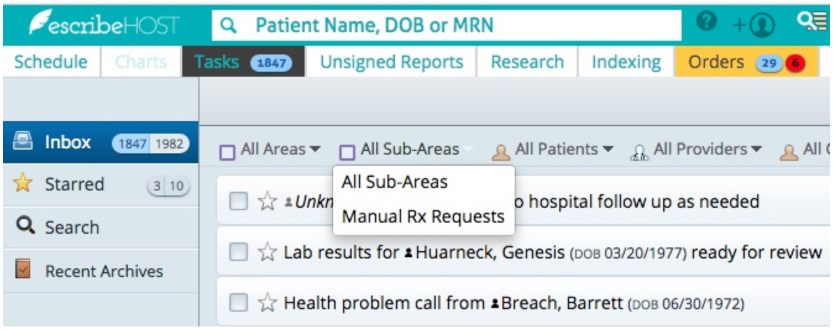
Release 6.27 will provide a new Tasks filter called: Task Sub-Areas. Aministrators will use a new section in Admin to create and manage subsets of Tasks Types within a Task Area. Such a subset allows users to filter tasks more narrowly than at the level of the Task Area. For example, the administrator could create these Task Sub-Areas:

- "Manual Rx Requests" made up of only Authorization Requests, Renewal Request, and Rx Clarification Requests.
- "PA & Schedule" made up of only Prior Auth & Schedule tasks for the three Order Types.
- "Transitional Care" made up of only the Transitional Care Management Patient Call.

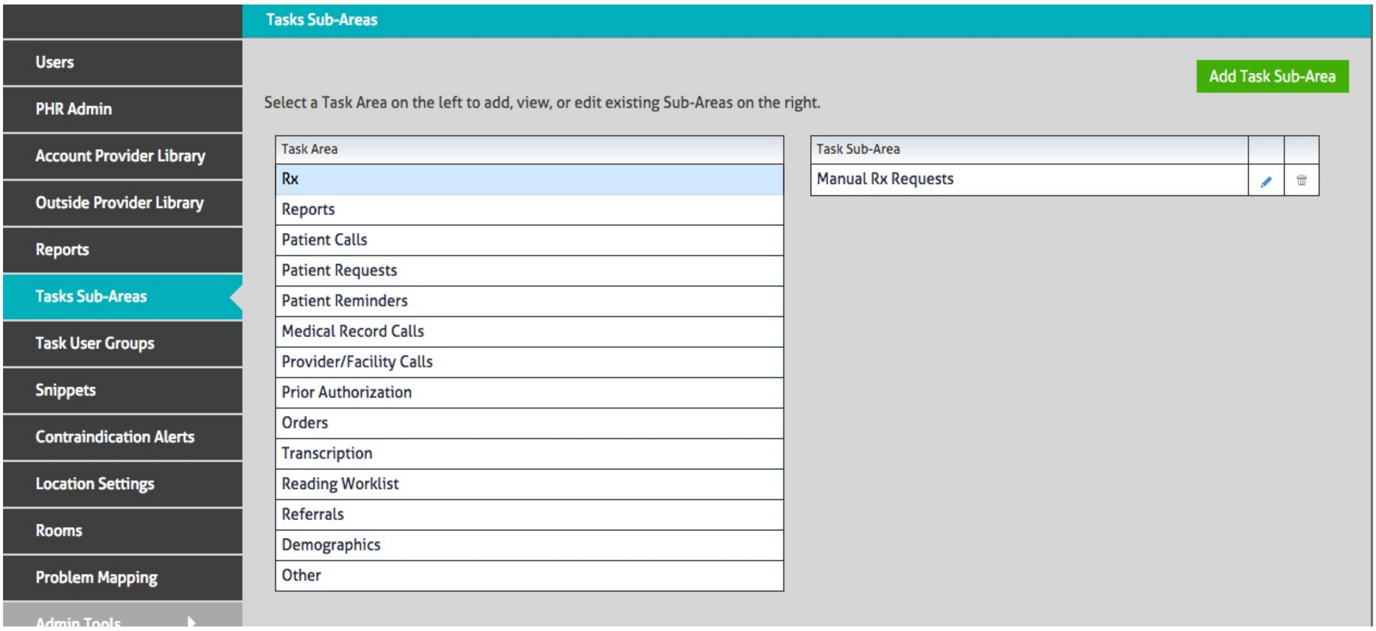
Task Sub-Areas Filter

The Task Sub-Area filter has been added to the Task Inbox filters.

All Task Sub-Area filters created in the Task Sub-Areas Admin section are available in this list.



Task Sub-Areas Admin Section



Task Sub-Areas are created within the existing Task Areas which are displayed on the left.

Task Sub-Areas that have been created within the selected Task Area display on the right.

Each Task Area can have multiple Task Sub-Areas.

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Add a Task Sub-Area

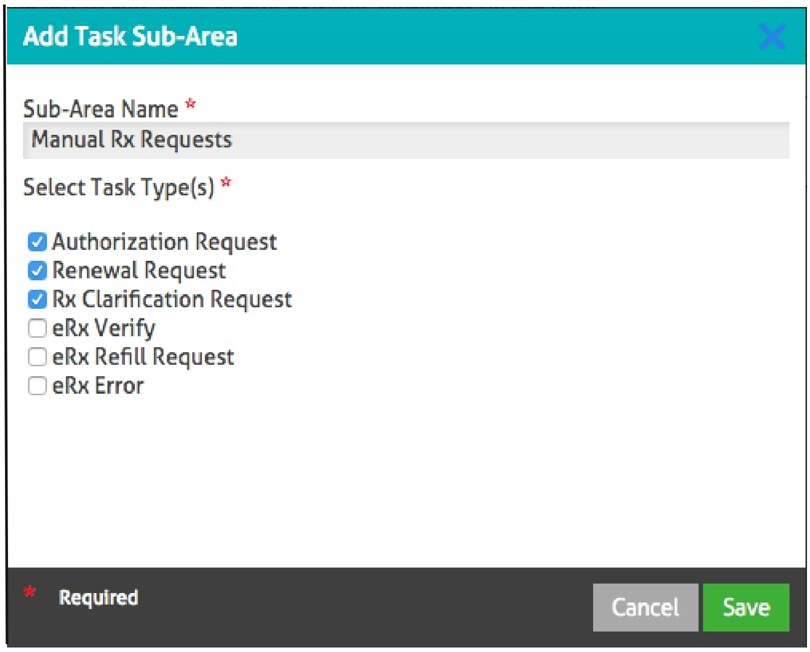
1. Select the Task Area in which to add the new Task Sub-Area.

2. Click Add Task Sub-Area . This opens the Add Task Sub-Area popup.

3. Create a name for the Sub-Area.

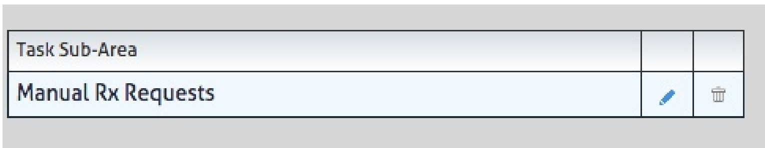
4. Select one or more Task Types from the selected Task Area.

5. Click Save. The new Task Sub-Area is added to the list.



Edit a Tasks Sub-Area

1. Select the Task Area on the left that contains the Task Sub-Area you want to edit.



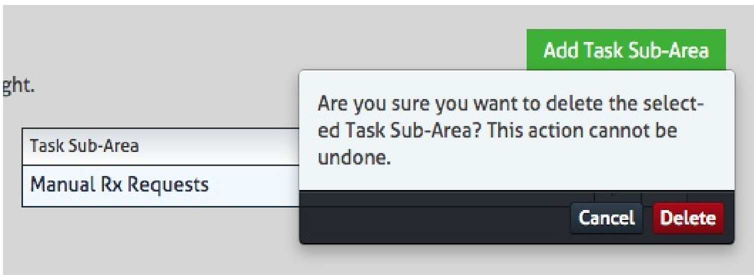
2. Click to open the Edit Task Sub-Area popup.

3. You can change the name and add or remove Tasks Types.

4. Click Save.

Delete a Tasks Sub-Area

1. Select the Task Area on the left that contains the Task Sub-Area you want to delete.



2. Click to open the Delete confirmation message.

3. Click Delete . The Sub-Area is removed from the list on the right.