

Quick Reference Guide - Task Sub-Areas

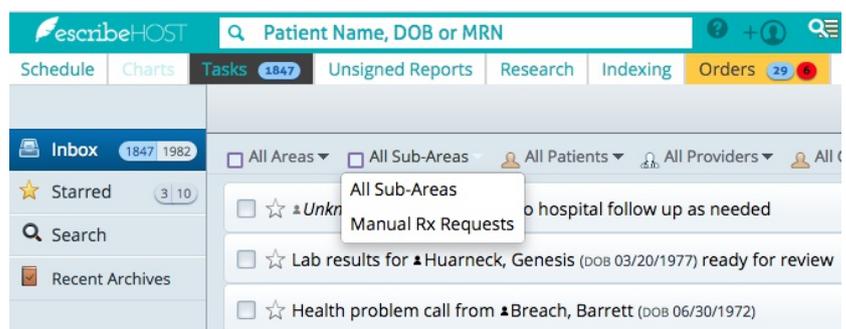
Release 6.27 will provide a new Tasks filter called: Task Sub-Areas. Administrators will use a new section in Admin to create and manage subsets of Tasks Types within a Task Area. Such a subset allows users to filter tasks more narrowly than at the level of the Task Area. For example, the administrator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

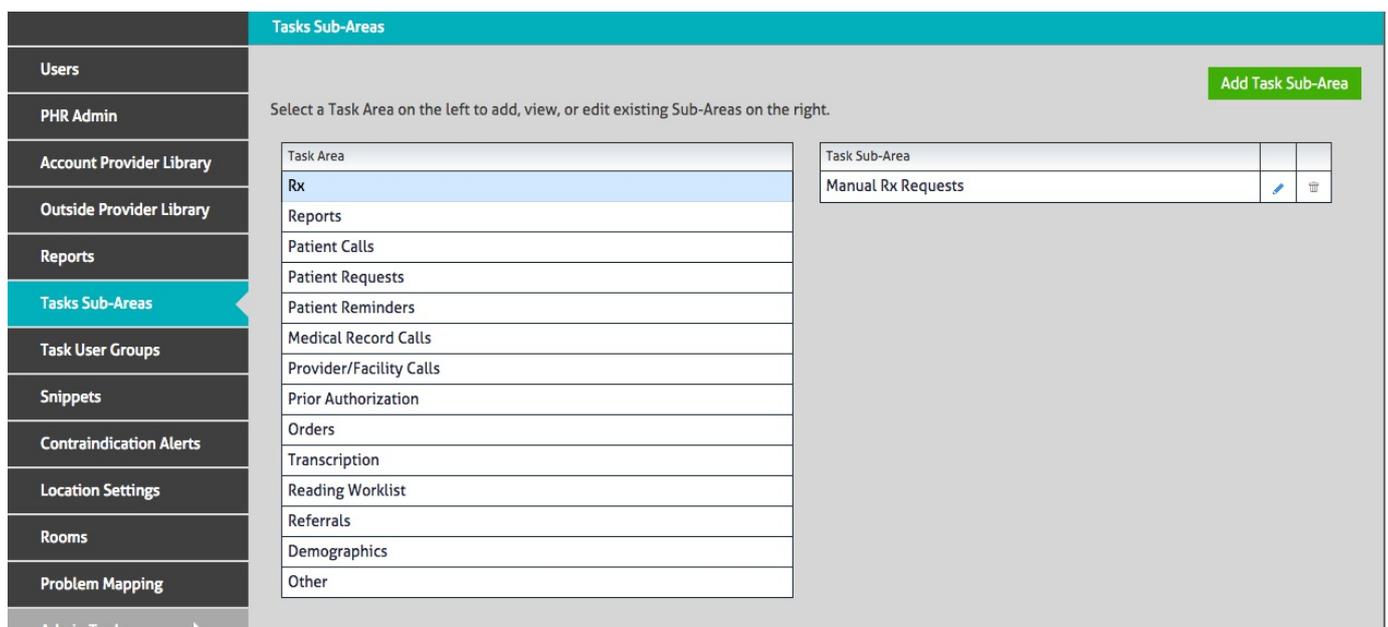
Task Sub-Areas Filter

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.

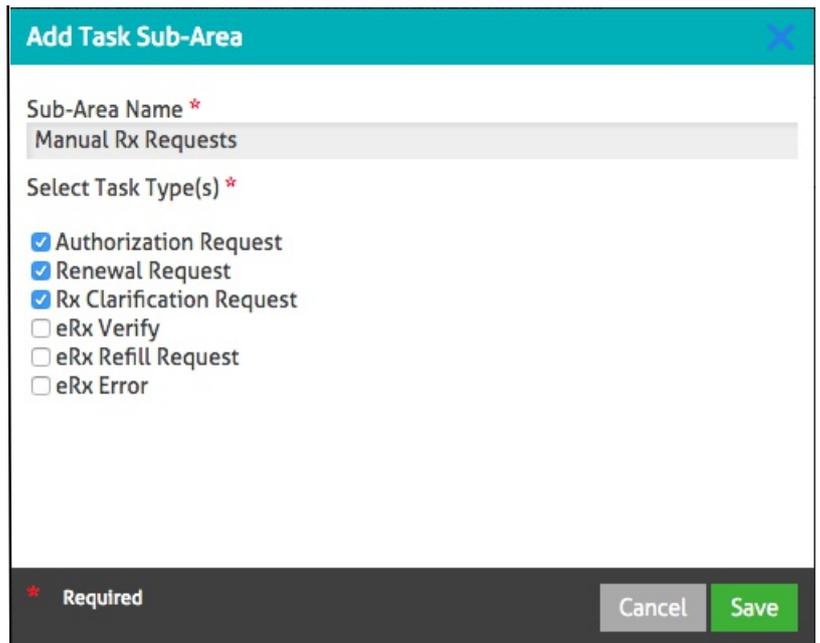
Task Sub-Areas that have been created within the selected Task Area display on the right.

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 . 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.



The screenshot shows a modal window titled "Add Task Sub-Area" with a close button in the top right corner. The form contains the following fields and options:

- Sub-Area Name ***: A text input field containing "Manual Rx Requests".
- Select Task Type(s) ***: A list of checkboxes with the following options:
 - Authorization Request
 - Renewal Request
 - Rx Clarification Request
 - eRx Verify
 - eRx Refill Request
 - eRx Error

At the bottom of the form, there is a legend for the asterisk (*) indicating "Required". To the right of the legend are two buttons: "Cancel" and "Save".

Edit a Tasks Sub-Area

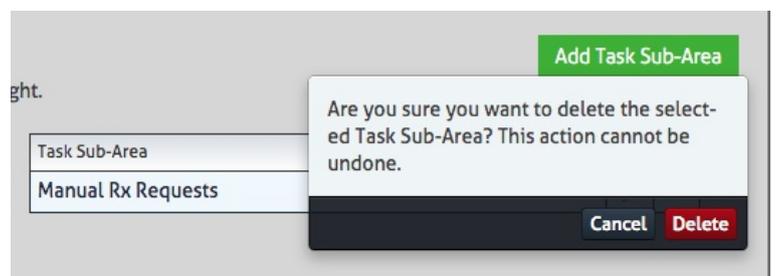
1. Select the Task Area on the left that contains the Task Sub-Area you want to edit.
2. Click  to open the Edit Task Sub-Area popup.
3. You can change the name and add or remove Tasks Types.
4. Click Save.



Task Sub-Area		
Manual Rx Requests		

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



The screenshot shows a confirmation dialog box overlaid on a table. The dialog box contains the following text and buttons:

Are you sure you want to delete the selected Task Sub-Area? This action cannot be undone.

Buttons: Cancel, Delete

The background table shows a list of Task Sub-Areas, with "Manual Rx Requests" selected. A green "Add Task Sub-Area" button is visible in the top right corner of the background interface.