escribeHOST

Quick Reference Guide - TASKS

Significant changes are being made to Tasks with the release of 7.2 in March 2020 to improve tasks filtering, improve system performance, and reduce response time. This document describes those changes.

Tasks Inbox Limit

Displayed results are limited to a maximum of 100. This is necessary to improve system performance and reduce response time. New filters and sort tools have been implemented to compensate for the new limit.

Changes to Existing Filters

Areas/Types Filter

The All Areas, All Types, and All Sub-Areas filters are replaced with a single filter that allows users to select one or more Areas, one or more Type in any Area(s), or any single Sub-Area. It works much like the Search page.

Use the checkboxes to select the Areas/Types to be included in the displayed Tasks list. This provides much more granularity in filter selection.
Click **OK** after making your selections to apply the filters.
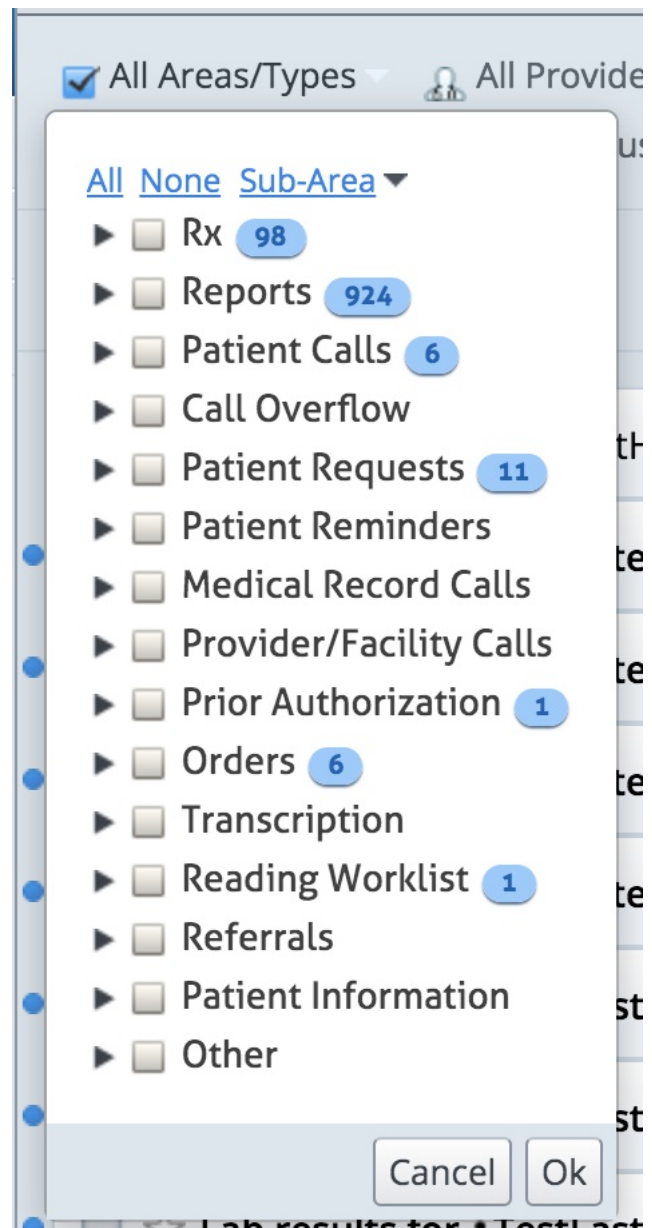The default selection is All Areas/Types.

The filter displays:

"All Areas/Type" when user clicks ALL.

[Area] when user selects and Area or all tasks in a single Area

[Area] - [Type] when user selects a single Type in a single Area

[#] Types when user selects multiple types in a single area or multiple areas

[Sub-area] when user selects either a sub-area by name OR the selection of tasks exactly matches the set of tasks for a sub-area

Changes to Existing Filters (cont.)

Hidden Filter

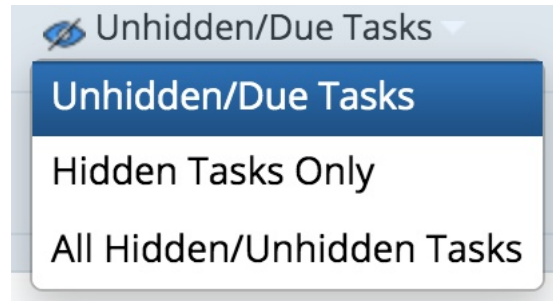The Show Hidden checkbox is now a filter with these 3 options:

Unhidden/Due Tasks
- Excludes hidden tasks that are not yet due

Hidden Tasks Only
- Excludes unhidden tasks, regardless of due date (i.e., It will show only tasks where the "Hide Until Due" was set.)

All Hidden/Unhidden Tasks
- Excludes no tasks by Hidden status

New Filters

Handler Filter

The new Handler filter allows users to filter the Tasks Inbox list by:

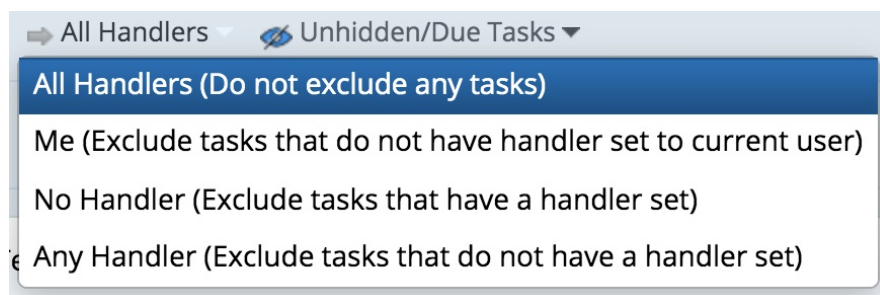**All Handlers**
- Does not exclude any tasks by Handler

Me
- Excludes tasks where handler is not current user

No Handler
- Excludes tasks that have a handler set

Any Handler
- Excludes tasks that do not have handler set

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New Filters (cont.)

Due Status Filter

The Tasks Inbox no longer automatically displays Overdue tasks in a separate section at the top; however, Overdue tasks can be "pushed" to the top of the list using the new "Due Status" filter in combination with the new Sort feature (see below for *Sort*).

The new Due Status Filter has these options:

All Due Statuses
- Does not exclude any tasks by due date status

Due (Today or Overdue)
- Excludes tasks that are not due yet

Not Due Yet (Due after Today or No Due Date)
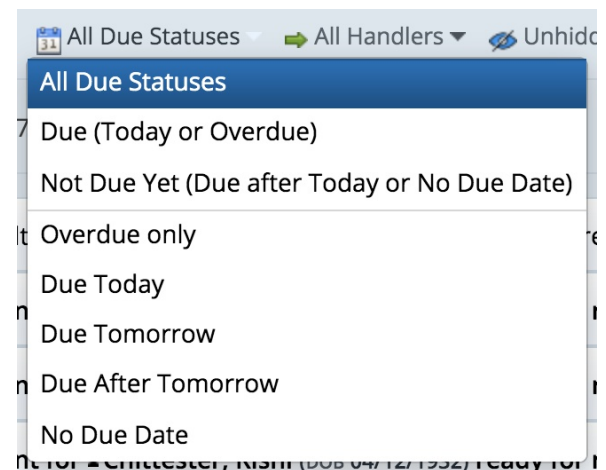- Excludes tasks that are due today, or are overdue

Overdue Only
- Excludes tasks that are not due yet, or are due today

Due Today
- Excludes tasks that are not due yet or are overdue

Due Tomorrow
- Excludes tasks that are due today or are overdue, or are due after tomorrow, or have no due date

Due after Tomorrow
- Excludes tasks that are due today, or are overdue, or are due tomorrow, or have no due date

No Due Date
- Excludes tasks that have any due date set

Persist Filters

Filter selections persist in the browser tab and will not reset until the user logs out.

New browser tabs will be set to the default filters.
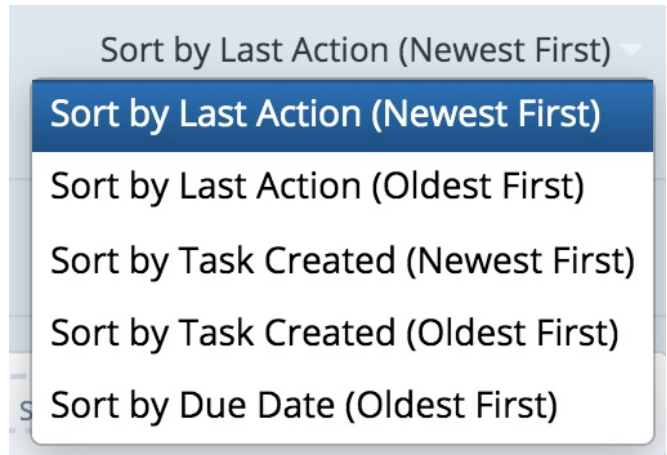
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New Sort Feature

The new Sort option allows user to sort the displayed list by:

- **Last Action (Newest First)**
- **Last Action (Oldest First)**
- **Task Created (Newest First)**
- **Task Created (Oldest First)**
- **Due Date (Oldest First)***

*Default sort

These actions **UPDATE** the Last Action date/time:

Add Comment
Add Other
Resolve
Acknowledge
Set/Change Due Date
Acquire Ownership
Match Patient
Match Provider
Require Feedback
Accept/Reject Feedback
Set/Change Handler
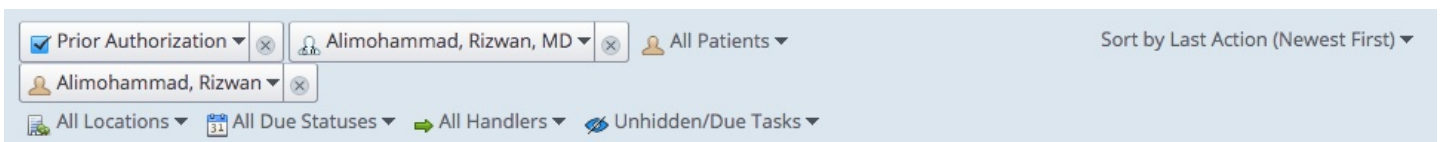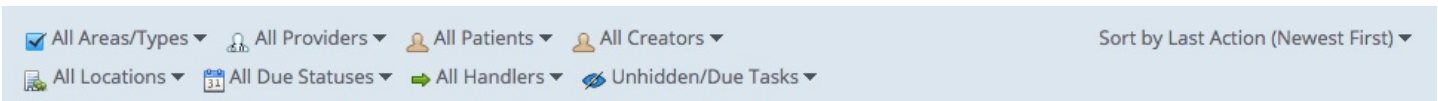

These Actions **DO NOT UPDATE** Last Action date/time:

Read
Star
Archive
Hide/Unhide
Print

Filters Can Wrap

New filters will display as shown in the top image below when default filters are applied (if your screen resolution is sufficient).
Filters will wrap to the next line if multiple filters are changed from the defaults to allow them to display the selected values as shown in the bottom image below.
The Sort tool is not included in the wrap. It never moves.

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Counters

Module Tool Bubbles

The blue bubble continues to display a count of unread tasks in your Tasks Inbox. The count includes both hidden and unhidden tasks that are overdue or due today.

The new red bubble displays a count of tasks in your Tasks Inbox that are due today or overdue, including Hidden tasks.

Select "Due (today or overdue)" option in the Due Status filter to restrict the list to only Due tasks.

Hover over each bubble to see a description of that count.
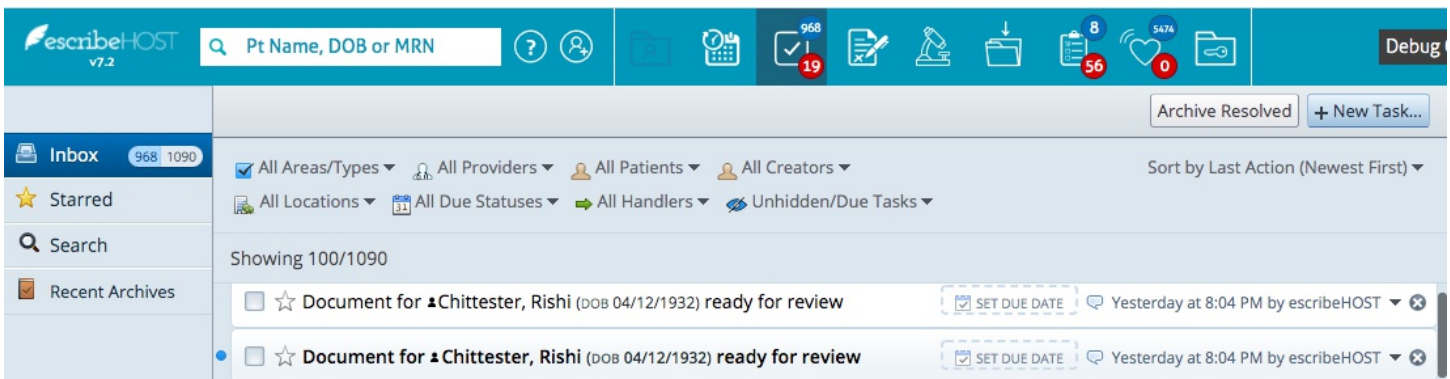

Inbox Counts

The left side of the pill displays a count of unread tasks in the Inbox (same as blue module bubble).

The right side of the pill displays a count of all tasks in the Inbox.

All inbox counts reflect the default task filters.

NOTE:
Changing the Hidden filter can include tasks that were hidden from the inbox, resulting in higher counts.
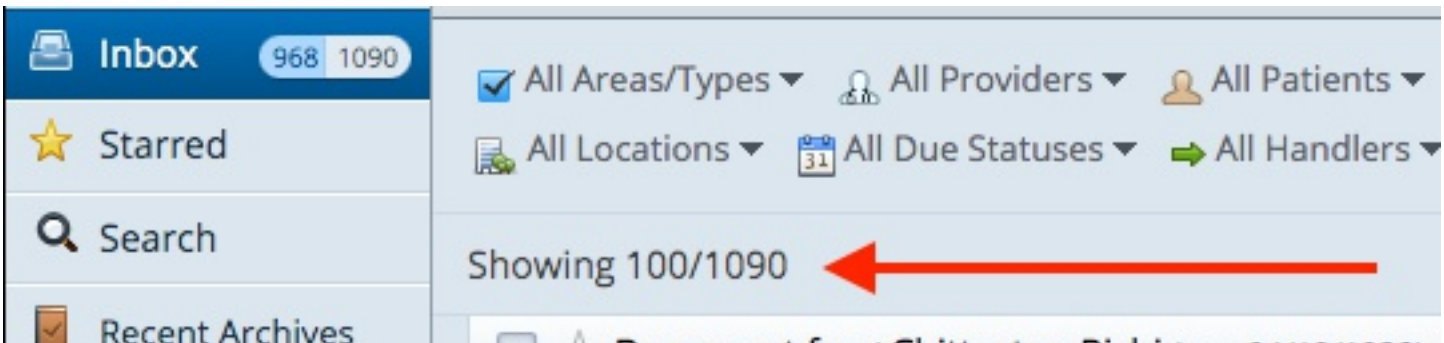
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Counters (cont.)

Displayed List Counts

A new count displays as a ratio at the top of the Tasks list:

- The number on the left displays the count of displayed tasks.
- The number on the right displays the count of all Tasks in the displayed list that meet the filter criteria. This count will match the right side of the Inbox pill only when the default filters are applied.

Default filter selections are:
All Areas/Types, All Patients, All Providers, All Creators, All Locations, All Due Statuses, Unhidden/Due Tasks, All Handlers.

Changes to Tasks List

Tasks are now loaded fresh each time user visits the Tasks module and when filters are updated.

The Tasks are not loaded automatically on login (if default module is Tasks, then tasks are loaded on login).

Persist Expanded Task

Users will be able to expand only one task at a time in the Tasks Inbox but will be able to expand multiple tasks at a time in the patient chart Tasks section.

The expanded task in the Tasks Inbox remains expanded and scrolls into view when the user leaves the Tasks Inbox and returns.

Expanded tasks in the Patient chart do not remain expanded.