



Tips & Tricks Weekly



Task Details Window

Happy Wednesday ETSU Health Team! This Tips and Tricks will address the Task Details Window and the various options you have when sending tasks. We will cover how to open a new task, specifying patient vs non-patient, selecting between users/teams and different task types, the comment field, and lastly selecting notification when complete/activation dates.

1. Open the Task Details Box by choosing the “New Task” icon in the toolbar. This window will provide a multitude of options for sending various tasks and will even allow you to change the task activation date and the task overdue date.
2. One useful feature of Touchworks is the ability to select “Quick Chart” and “Quick Appointments” from within most dialog boxes/windows, selecting Quick Chart or Quick Appointments provides an overlay over your current window. You may also select one of two options to dictate if the task is regarding a patient or more of a general task that is not concerning a patient by selecting either Option 1 “Not about a patient” or Option 2 “Concerning Patient: _____”
3. Touchworks requests the user input either a user or a team. Task type identifies a subject and allows the EHR to place tasks in a specific category. The Priority field includes 3 options (routine, urgent, ASAP) which allows the task to be sent with a flag alerting the task recipient to the urgency of the matter.
4. The comment field allows you to compose messages, macro’s are also available in this field. (.dontremovetasks for example)
5. You can also activate tasks by date/time and set overdue dates with options located at the bottom of the task details box, you will also find that you can create notification tasks to send to users by checking the “when complete” and or “when overdue” checkbox.
6. Pro tip: Don’t ever remove tasks.

The screenshot shows the 'Task Details' window in Touchworks. It includes fields for 'Assign To' (User or Team), 'Task' type, 'Priority' (Routine, Urgent, ASAP), and 'Status' (Active). There are also fields for 'Activate' and 'Overdue' dates with calendar icons. At the bottom, there are checkboxes for 'Create Notify Task' with 'When Complete' and 'When Overdue' options, and a 'Notify' dropdown menu. A comment field contains the text '.dontremovetasks'. The window also shows a 'Task Details' sub-window with patient information and a 'Patient Appointments' table.

Appt Date	Status	Provider
03-Aug-2022 08:35 AM	Arr	ALLSCRIPTS, Provider

FYI	Superuser, Cyclops	001000643...	Kinkead,Dalton	Kinkead, Dalton	09-Aug-2022 10:34 am	Active
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This screenshot shows the bottom portion of the task details window, including the 'Comments' field with the text 'TASK CREATED .dontremovetasks', the 'Task About' field, and a row of action buttons: 'Go To...', 'In Progress', 'Done' (highlighted with a green circle), 'New...', 'Reply...', 'Reassign...', and 'Remove...'. Below these are 'Undelegate', 'Reactivate...', 'Details...', 'Original...', and 'Print List...' buttons.