Task Manager

Task Manager

<u>What is Task Manager?</u>

Task Manager is a way to schedule reminders (tasks) for personal and office use.

The Task Manager enables you to setup recurring tasks for a day, week, month or once a year and can be setup to automatically appear when logging on to Eaglesoft.

Task Manager allows you to remove all your sticky notes you have all over your desk once and for all.

You have the ability to create private tasks for yourself or tasks for other employees and can sort them by the following categories:

- Status – Not Started, In Progress, Waiting on Someone Else, Completed
- Priority – High, Medium, Low
- Due Date
- Employee Assignment
- Category – can create customizable categories
- Patient – if task assigned to specific patient

You have the ability to mark the task Private, so will only display in the Task List when the specific person is logged into Eaglesoft.

PATTERSON TECHNOLOGY

Task Manager

Create Tasks with recurring guideline (frequency) that you specify upon creation:

- Daily
  - Every X day(s)
  - Every weekday
  - Every day

- Weekly
  - Every X week(s)
  - Every week
    - Assign specific day(s) of the week

- Monthly
  - On the 1st-5th specific day of the month
  - On the X day of the month
  - Every X month(s)
  - Every month

Task Manager

- Yearly
  - On every (Month) (Day)
  - On the (X) (Day) of (Month)
  - Every X year(s)
  - Every year

- Once
  - Enter or choose a single date

Create a Starting Date

Create an Ending Date
- Can specify No Ending Date or
- Can stop after X occurrences

Create Reports based on specific criteria of the Tasks in your system through the Reports menu.

PATTERSON
TECHNOLOGY

Task Manager

Examples of Tasks utilized in Offices:

- Remind office staff to place calls on overdue accounts
- Remind office staff to generate Recalls
- Remind Office Manager to run EOM/EOY reports
- Remind Office Manager to age accounts and generate statements
- Remind Treatment Coordinator to generate and call patients on outstanding Treatment Plans
- Remind office staff of Monthly staff meeting
- Remind office staff to check if payment was received on a patient that promised to pay balance on specific day of the month
- Remind back office staff to place supply order

PATTERSON
TECHNOLOGY