



GeeseMed Task Manual - 2020



v7.0.25



Task

1. Add Task

- Path: “**Patient Hub>>Task>>Add Task**”



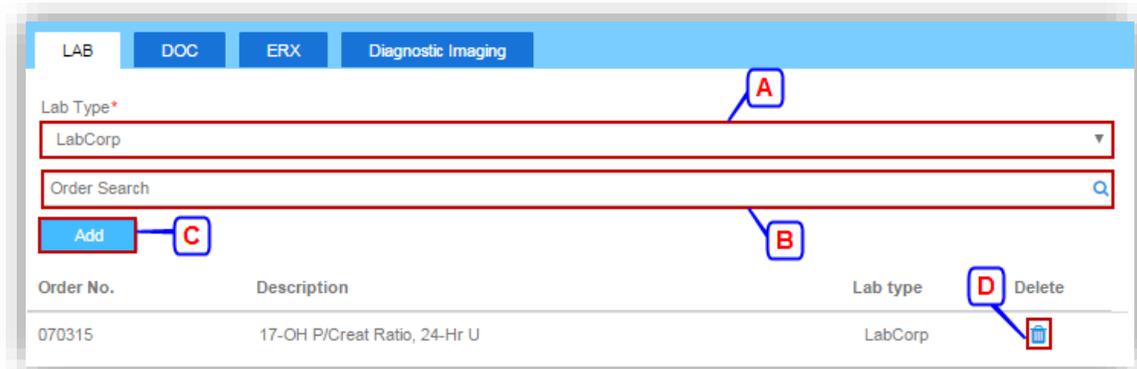
- ‘**Add Task**’ is used to create and assign a specific Task to any user for a specific Location.
- Clicking ‘**Add Task**’ opens the screen below.

Order No.	Description	Lab type	Delete
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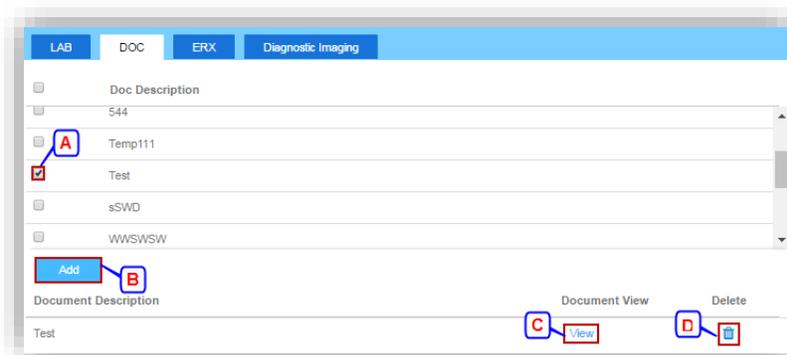
1. Select the Location from the drop-down menu.
2. ‘**Search**’ and ‘**Select**’ the Patient. (Patient list is based on selected location).
3. ‘**Search**’ and ‘**Select**’ the Provider. [Provider List is based on selected location]
4. ‘**Select**’ the Task Type by entering the first few characters of existing Task type.
5. Click ‘**Add**’ to add additional Task Type as needed.



- A. Under **"Task Type"**, enter the name of the Task Type you want to add.
 - B. Click **'Save'** to save the Task Type.
 - C. Click **'Delete'** to delete the existing Task.
6. **'Select'** the name of the User from the drop-down menu to whom you want to assign the Task. [User list is based on selected location.]
 7. Enter the **'Subject'** for the Task.
 8. Enter the **'Notes'** for the Task.
 9. Enter the **'Start Date'** for the Task.
 10. Enter the **'Due Date'** for the Task.
 11. **'Select'** the Status of the Task from the drop-down menu.
 12. **'Select'** the Priority of the Task from the drop-down menu.
 13. To **'Enter'** Lab Orders, as needed, follow steps below:



- A. **'Select'** the name of the Lab from the Lab Type drop-down menu.
 - B. **'Search'** and **'Select'** the Lab test needed
 - C. Click on **'Add'** to add the Lab Order name.
 - D. Click on **'Delete'** to delete the Lab Order name.
14. To include a Patient Document to the tasks, follow the steps below:

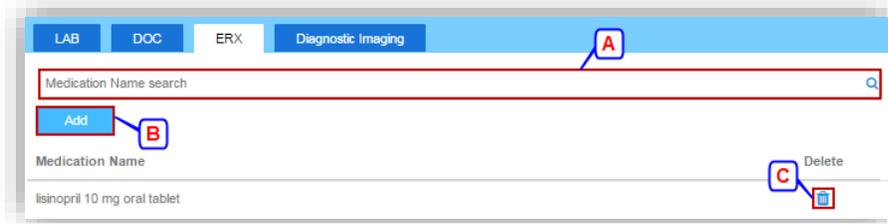


- A. Click on checkbox to select the Document.
- B. Click on **'Add'** to add the Document.

- C. Click on '**View**' to view the Document.
- D. Click on '**Delete**' to delete the Document.

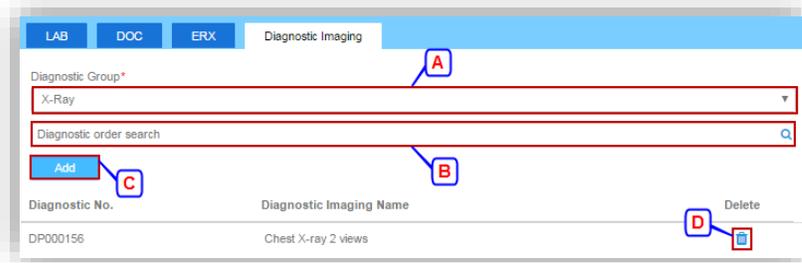
Note: Only documents previously added to the patient will be shown.

15. To include a medication for the task, follow the steps below:



- A. '**Search**' and '**Select**' the Medication Name.
- B. Click on '**Add**' to add the Medication Name.
- C. Click on '**Delete**' to delete the Medication Name.

16. To include Diagnostic Imaging for the task, follow the steps below as shown below.



- A. '**Select**' the Diagnostic Group from the drop-down menu.
- B. '**Search**' and '**Select**' the Diagnostic Order.
- C. Click on '**Add**' to add the Diagnostic Imaging.
- D. Click on '**Delete**' to delete the Diagnostic Imaging.

2. Review Task

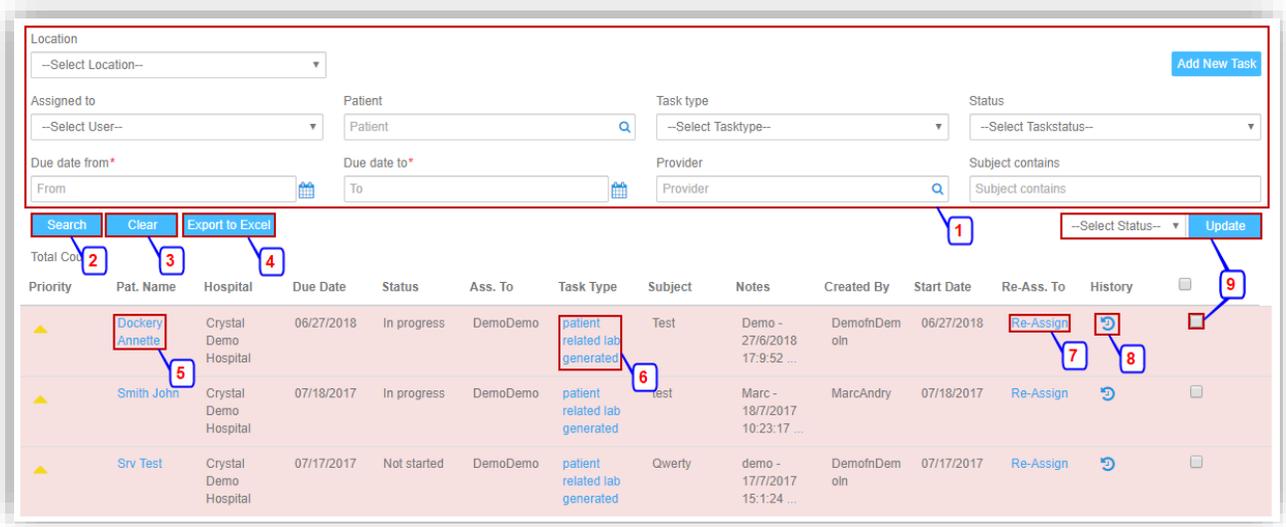
- Path : "**Provider Hub>>Task>>Review Task**"



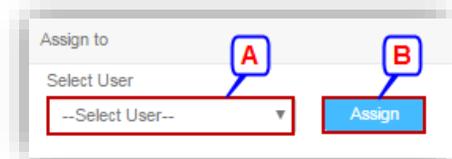
- "Review Task" is used to review all assigned tasks.
Note: With no filter selected, the user will show all the current Tasks which are assigned to their self containing the status 'Not Started'



1. Select the desired filters and follow the steps below.



2. Click on **'Search'** to search based on the Filters you have applied.
3. Click on **'Clear'** to remove all filter selections.
4. Click on **'Export to Excel'** to export search result details to Excel.
5. Click on **'Patient Name'** link and the screen will be redirected to Patient Chart.
6. Click on **'Task Type'** to open the Task Tab. You may assign the Task to another user, change the Status, or add Notes to the Task.
7. Click on **'Re-Assign'** to assign the Task to another User (User list is based on selected location based).



- A. Select the user to whom you wish to re-assign the Task from the drop-down menu.
- B. Click on **'Assign'** to assign the Task.
8. Click on **'History'** to open the History Tab and you will be able to see an audit trail of the Task history.
9. Click the checkbox, select the status and click on **'Update'** to update the status of the task.

View History						
Date	By User	To User	Status	Notes	Start Date	Due Date
06/16/2017	demo	Dimple Shah	Not started		06/16/2017	06/17/2017

Note:

Color	Status	Condition
Yellow	Not Started and In-Process	Start Date and Due Date are same
Red	-	Due Date is Expired
White	Completed and Cancelled	Task Completed or cancelled within or after Due Date