8. 

Click **Copy to Task**. The **Task Detail** page displays.

9. Select the desired task type from the **Task** drop-down menu and priority for the task from the **Priority** drop-down field.

10. Click 

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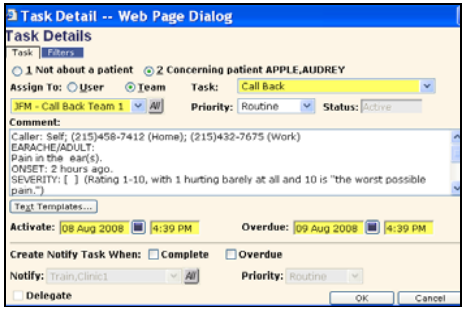


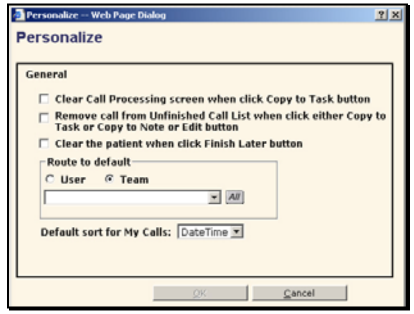
Accessing Unfinished Calls

1. From the **Vertical** toolbar, select **Call Process**.
2. Select **Unfinished Calls** from the **Horizontal** tabs. The **Unfinished Calls** page displays.

3. Select the appropriate call.
4. Unfinished calls may be edited, deleted and copied to a note or task from this page.

Personalizing Call Processing

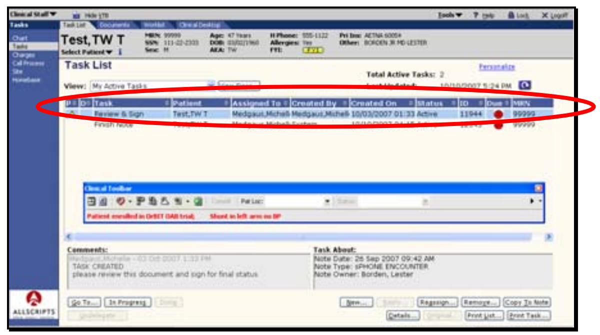
1. From the **Vertical** toolbar, select **Call Process**. The Call Processing page displays.
2. From the right side of the **Call Processing** page, click the **Personalize** link. The **Personalize** page displays.
3. To add or remove a personalization option, click the checkbox to the left of the appropriate item.
4. Select the appropriate options and click **OK.**



Viewing the Task List

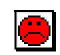
A JUP task is defined as a request to either supply information or perform an action. Tasks are both created and completed in the system either manually or automatically.

1. From the **Vertical** toolbar, select **Tasks**. The **Task List** page displays.



2. The **Task List** page may be sorted in ascending or descending order using any of the column headings displayed by clicking the arrows to the right of the column name.

Task View	Description
My Active Tasks	Displays active tasks for the person currently logged into the system.
Current Patient – Active	Displays only active tasks associated with the patient currently displayed in the **Patient Banner**.
Current Patient - All	Displays all tasks associated with the patient currently displayed in the **Patient Banner**.
My Completed Tasks for Today	Displays tasks completed today for the person logged into the system.
Team Views	Displays shared team views so that all members of a team can access the appropriate tasks.

Column	Description
P	Indicates the **Priority** (level of urgency) for the selected task. The 3 priorities include:  - Urgent (2 hours)  - ASAP (6 hours) No indicator displayed indicates a task that should be completed on a Routine basis. (24 hrs)
D	(**Delegated**) Indicates whether or not responsibility for the task has been delegated.
Task	Describes the particular information or action required by the task.
Patient	Patient with whom the task is associated. If blank, the task is not associated with a specific patient.
Assigned To	Person or team to whom "ownership" of the task is assigned.
Created By	Indicates whether the task was manually created (name of the person who created the task) or system-generated.
Created On	Date and time the task was created.
Status	Task status. Statuses may include: • **Active** — Indicates a task for which the activate date has been reached, but has *not* yet been completed. • **In Progress** — Indicates a task that is currently being performed. • **Complete** — Indicates a task that has been performed or completed. • **Inactive** — Indicates a task for which the activate date has not yet been reached. • **Removed** — Indicates a task which has been removed rather than completed.
Due	Task due status.  Indicates a task for which the due date has been reached, but has *not* yet been completed. No indicator displayed indicates a task for which the due date has *not* yet been reached.
MRN	(**Medical Record Number**) MRN of the patient with whom the task is associated.

3. Single-clicking on a task populates the **Patient Banner** with the patient's information and it displays the **Comments** at the bottom of the page.

4. Double-clicking on a task opens the **Task Details Dialog Box**.

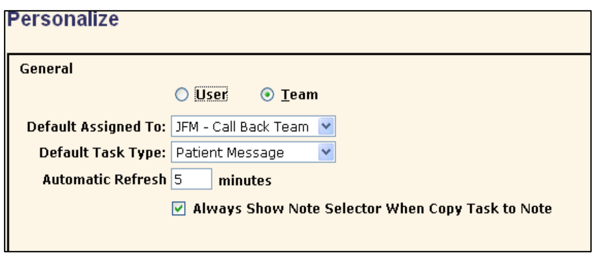
Working the Task List

After selecting the **Task List** page and sorting the information, the task list is ready to be worked. Working a task list includes the following activities:

Activity	Description
Viewing more information about a task	Select it, and then click **Details**. The system displays the **Task Details** page for that task.
Marking the status of a task as In Progress	Select the task, and then click In **Progress**. The name of the user who performed this action displays in the **Comments** box.
Performing or Completing a task	Select the task, and then click **Go To**. The system displays the workspace from which a task's action must be performed. For example, if working a Sign Note task, click **Go To** to display the **Note Authoring Workspace** and sign the note.
assigning a task	Select the task, and then click **Reassign**. Indicate the new owner's name; select a JUP user or a team.
Removing a task	Select the task, and then click **Remove**. The system requires a reason why the task is being removed to be indicated. Enter additional details as appropriate.
Replying to a task	Select the task, and then click **Reply**. Indicate who should receive the reply, and then enter an appropriate comment. You can also edit the task's priority if appropriate.
Copying a task to a note	Select the task, and then click **Copy to Note**. If a note is not in context, then the system displays the **Note Selector**; select the appropriate note.

Personalizing Tasks

1. Personalizing task settings allows the user to select defaults. Use the drop-down selector to create the desired settings.
2. Click **OK**.

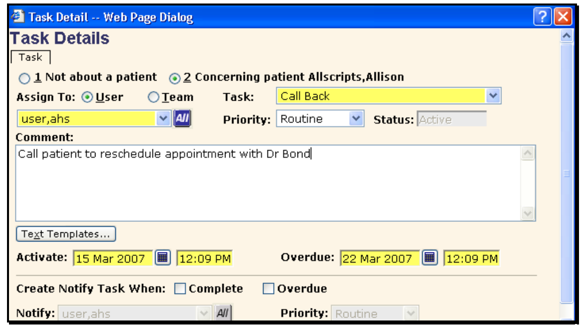


Creating a New Task

1. New Task... Click **New Task** from the appropriate page.

OR

If working from the **Clinical Desktop**, click the **New Task** button from the desired component. The **Task Detail** page displays.



2. If appropriate, verify that the **Concerning patient** radio button is selected.
3. Select the appropriate **User** or **Team** radio button in the **Assign To** area.
4. Select the desired **User** or **Team** name from the **Assign To** drop-down menu or click the **All** button and search for the appropriate recipient.
5. From the **Task** drop-down field, select the desired task type.
6. Choose the desired priority for this task from the **Priority** field - Routine, ASAP or Urgent.

   Routine – 24 hours

   ASAP – 4 hours

   Urgent – 2 hours
7. Enter the desired text for the person receiving this task to read in the **Comments** field.
8. If applicable, select the desired **Create Notify Task When** checkbox for this task.
9. Click OK to activate the new task.

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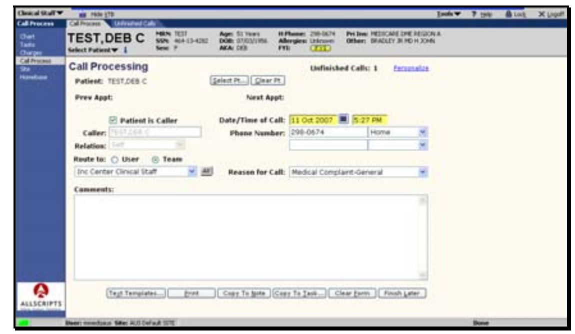
CALL PROCESSING & TASKING

Processing a Call

1. From the **Vertical** toolbar, select **Call Process**. The **Call Processing** page displays.



2. Click the Select Pt... button.
3. Search for the patient and double-click on the desired patient.
4. Click the **Patient is Caller** checkbox, if applicable.
5. Select the **User** or **Team** radio button from the **Route To** area and the user or team from the drop-down menu.
6. Select the appropriate reason for the call from the **Reason for Call** drop-down menu.
7. Enter the appropriate detail information in the **Comments** textbox. Either use free text or select a **Text Template**.