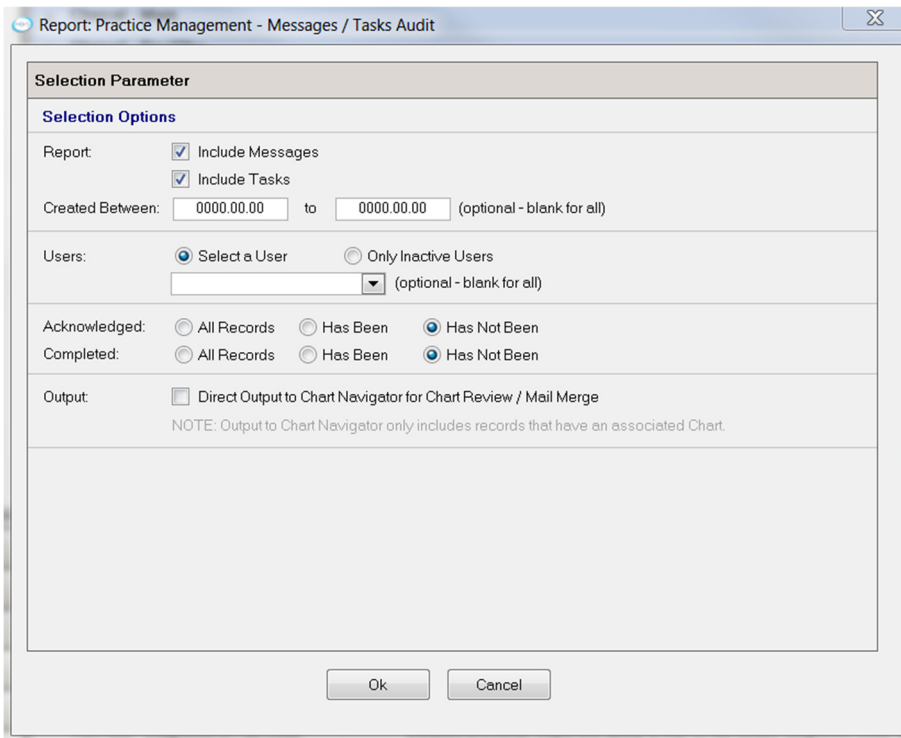


Messages/ Tasks Audit (Practice Management)

Purpose: The purpose of this audit is to provide a summary of Tasks and Messages that are in a specific state. It is very useful for reporting on what Tasks and Messages have not been reviewed yet by users and may have been missed and/or what users currently have 'on the go'. This is a great report for Clinic Managers to keep in mind to run periodically in order to see what all employees are currently working on. This could also be useful to ensure that Forwarded tasks are being dealt with as needed.



If no parameters are selected, the report will pull for all users as of today with Tasks and Messages that have not been Acknowledged or Completed.

| | |
|-----------------------------------|---|
| Include Messages: | Select this checkbox if you would like to include Messages on the report. |
| Include Tasks: | Select this checkbox if you would like to include Tasks on the report. |
| Created Between: | Enter a date range for the creation date of the Messages and/or Tasks. This field is optional, if left blank MOIS will pull all records. |
| Select a User: | Select this radio button if you would like to choose a specific user from the drop-down list. This list can be left blank to report on all users, including inactive users. |
| Only Inactive Users: | Select this radio button to report on all inactive users. |
| Acknowledged: | Choose whether to report on all records, records that have been acknowledged, or records that have not been acknowledged. |
| Completed: | Choose whether to report on all records, records that have not been marked as completed, or records that have been marked as completed. |
| Output to Chart Navigator: | Select this checkbox to output the report to the Chart Navigator. This can only open charts for Messages and/or Tasks that have a chart associated to them, and will not show Messages and/or Tasks without an associated chart within the Chart Navigator option. |

The report output provides a list of users separated by Tasks and Messages, and shows the records that are in their Inbox. The status of the user (Active or Inactive) is stated in brackets beside the username. The report lists the creation date of the Task or Message record, who created the record, whether it has been Acknowledged and Completed, the Chart Number associated with the record (if applicable) and the Subject. It also lists the total number of records in the user's Messages or Task Inbox, the total number of Acknowledged and Not Acknowledged records, and the total number of Completed and Not Completed records.

The report has the following sort order:

1. Username
2. User section: Messages, then Tasks
3. Created Date with most recent date first

Sample Questions

1. What are the statuses of Tasks and Messages for all inactive users?
2. For a specific user, do they have Tasks and Messages that have not been acknowledged or completed?
3. Show me a list of Tasks and Messages for a specific user, and review the patients associated to them using the Chart Navigator.