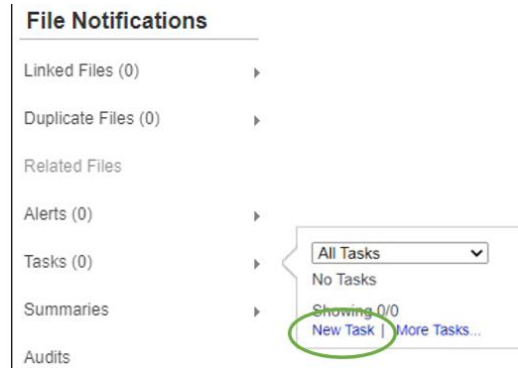


## QUICK REFERENCE GUIDE

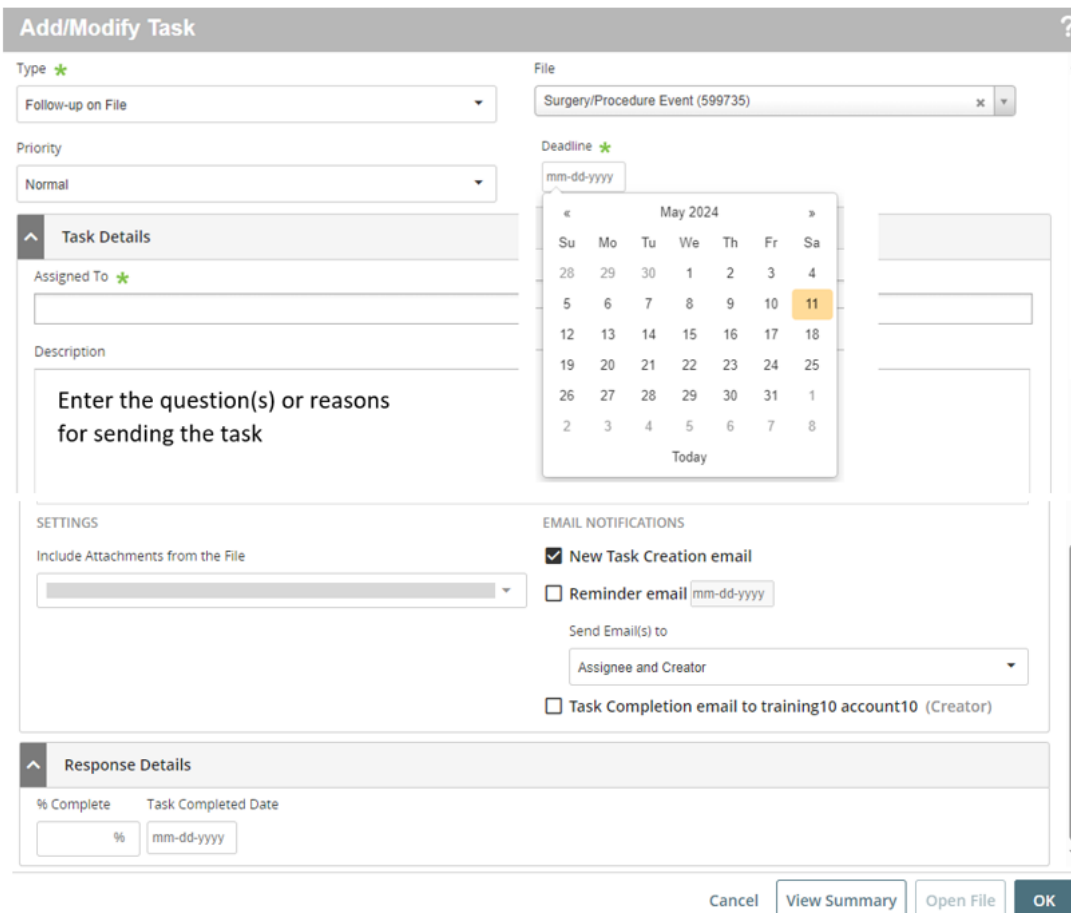
Tasks are an assignment that you can send to a person(s) who has a RL file manager account. You can also receive tasks from others. When a task is assigned, it gives them temporary access to the file.

### Assigning a task:

1. Open up the file that you want the task created from
2. Click **Tasks** under the **File Notification** along the left-hand side
3. Select the **New Task** link



4. The **Add/Modify Task** dialog box opens
5. Use the drop box to scroll through **Type** of task being assigned, for example **Follow-up on File**
6. Use the drop box to select priority, **Low/Normal/High**
7. Click in the **Deadline** box to set the date for completing task



The 'Add/Modify Task' dialog box is shown with the following fields and options:

- Type:** Follow-up on File
- File:** Surgery/Procedure Event (599735)
- Priority:** Normal
- Deadline:** mm-dd-yyyy (Calendar open for May 2024, with the 11th selected)
- Task Details:**
  - Assigned To:** \*
  - Description:** Enter the question(s) or reasons for sending the task
- SETTINGS:**
  - Include Attachments from the File: [Dropdown]
- EMAIL NOTIFICATIONS:**
  - New Task Creation email
  - Reminder email [mm-dd-yyyy]
  - Send Email(s) to: Assignee and Creator
  - Task Completion email to training10 account10 (Creator)
- Response Details:**
  - % Complete: %
  - Task Completed Date: mm-dd-yyyy

Buttons at the bottom: Cancel, View Summary, Open File, OK

# Task Management in RL

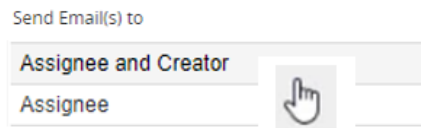
## 8. Complete **Task Details**

Start typing first few letters of the name(s) of the person(s) who you want to assigning a task to in the Assigned To text box. When you type the letters, a corresponding selection of user names appear. You can assign the same task to more than one person

## 9. Complete the description of the task. This will be included in the email notification of the task

## 10. Review task Settings and set the **Email Notifications**

## 11. Determine if you want to also receive the task notification by using the drop box in **Send Email(s) to Email(s) to**



## 12. Click **OK**

## Reviewing Task Management

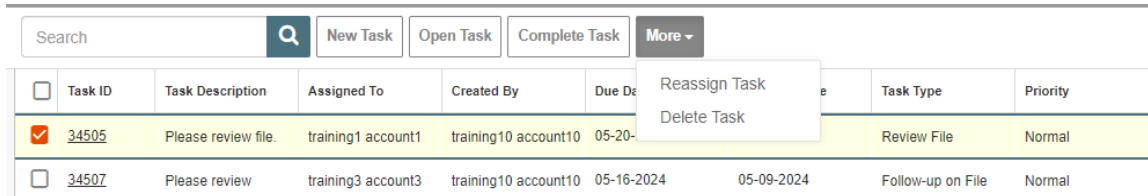


### 1. Click the Task icon on the Navigation toolbar

Note: Tasks that have been assigned to you or you have assigned to others will be displayed

### 2. Click on the **System View** to see the tasks you want to review (**Today's/Future/Overdue** and **My Delegated/Incomplete/Completed**)

### 3. Click on the box for the file you want to review and additional actions will appear



<input type="checkbox"/>	Task ID	Task Description	Assigned To	Created By	Due Date	Task Type	Priority	
<input checked="" type="checkbox"/>	34505	Please review file.	training1 account1	training10 account10	05-20-	Review File	Normal	
<input type="checkbox"/>	34507	Please review	training3 account3	training10 account10	05-16-2024	05-09-2024	Follow-up on File	Normal

### 4. Select the action you wish to complete (**New/Open/Complete/Reassign** or **Delete**), complete dialog box as applicable and click **OK**

## Receiving a Task

You will receive an email notification when you've been assigned a task. The email will include the link to the file ID#, a description of the task and the due date.

1. Click on link in the email notification or open file in the **Task Icon** in your RL account (click on **File ID** or click the box in front of file then **Open Task**)
2. Enter in any work done on file by selecting **Add Follow-up**
3. **Sign-Off** once your work on file is completed found in the **Add Follow-up** drop box
4. From **Task Management**, select box in front of **File ID** and select the **Complete Task** button or
5. From within the opened file from **File Notification – Tasks**, select **Complete**
6. The Complete Task dialog box open, select **OK**

The task is removed from the **My Incomplete Task** view in the **File Info Center** and you no longer have access to this file.

Notes: If an event is closed, assigned tasks still need to be completed. Reminders will be sent until the task is complete. Those assigned a task do not have permission to close a file. Full access would need to be granted to do this function.

**QUESTIONS?** Contact [RL.Support@sharedhealthmb.ca](mailto:RL.Support@sharedhealthmb.ca)