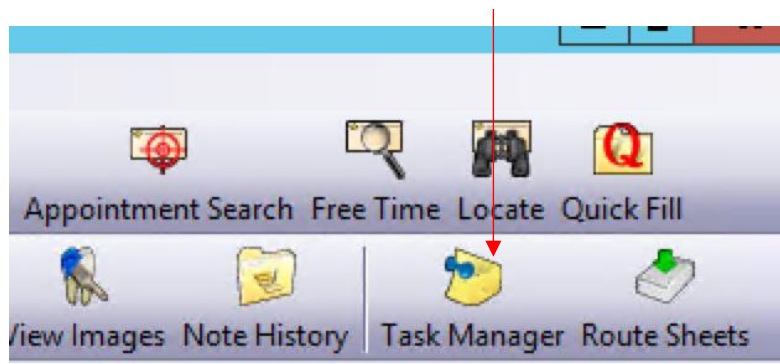


Eaglesoft Task Manager- Case Management

The Task Manager can be utilized for a variety of purposes:

- Remind office staff to place calls on overdue accounts
- Remind office staff to generate Recalls
- Remind Practice 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

From the schedule choose Task Manager



Choose New



DENTAL BRANDS

Raising the standard in children's oral healthcare

Task Manager

Site: Dentistry For Children Of MD - C...
For: IT Admin LOGIN

Show Future Tasks

Sort By: Status Priority Due Date Assigned To Category Patient

Status	Priority	Subject	Due On	Assigned To	Category	Patient
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New Edit Delete Print Report Close

Subject: Case Follow Up

Choose a Due Date

Choose the Patient

Category: Case Management

Assigned To: It will be automatically assigned to the person logged in, but the drop down menu allows you to change the assignment to a staff member

Set Freq- Allows you to set a frequency for reoccurring tasks









DENTAL BRANDS

Raising the standard in children's oral healthcare

New Task [X]

Subject: Case Follow Up

Due Date: 09/24/2019 [v] None

 Patient: 3 **Test Test**     **Tx** 

Patient Information [v]

Category: Case Management [v]

Assigned To: IT Admin LOGIN [v] Private

Priority: Low Medium High

Status: Not Started [v]

Date Entered: 9/24/2019 Entered By: IT Admin LOGIN

[OK] [Set Freq] [Cancel]

Priority and Status can be used and are applied when filtering the Task Manager for reporting purposes.



DENTAL BRANDS

Raising the standard in children's oral healthcare

Subject: Case Follow Up

Due Date: 09/24/2019 None

Patient: 3 **Test Test**

Category: Case Management

Assigned To: IT Admin LOGIN Private

Priority: Low Medium High

Status: Not Started

Date Entered: 9/24/2019

Buttons: OK, Set Freq, Cancel

When you log in you will see your tasks for that day. You can also choose Show Future Tasks to view all in the queue. You can print a report of tasks with customized sorting.

Site: Dentistry For Children Of MD - C...

For: IT Admin LOGIN

Sort By: Status Priority Due Date Assigned To Category Patient

Show Future Tasks

Status	Priority	Subject	Due On	Assigned To	Category	Patient
<input type="checkbox"/>	Medium	Case Follow Up	9/24/2019	IT Admin LOGIN	Case Management	Test Test
<input type="checkbox"/>	Medium	Case Follow Up	10/8/2019	IT Admin LOGIN	Case Management	Test Test

Buttons: New, Edit, Delete, Print Report, Close

It will default to the location you are logged into. However, if you do not see your tasks, make sure you are in the correct location.



DENTAL BRANDS

Raising the standard in children's oral healthcare

Task Manager

Site: Dentistry For Children Of MD - C...
For: All Sites
Sort By: Date

Show Future Tasks

Assigned To Category Patient

Status	Due On	Assigned To	Category
Up	9/24/2019	IT Admin LOGIN	Case Management
Up	10/8/2019	IT Admin LOGIN	Case Management

Task Manager Report Filter

Site: Dentistry For Children Of MD - Columbia

Sort By:

Status Due Date Category
 Priority Assigned To Patient

Filter By:

Status: Assigned To:

Priority: Category:

Due Date: From: To: None

Patient: Age: