Filtering tasks within Netsmart allows users to view Incomplete Tasks or All Tasks.

Customizing View of Tasks

Depending on the need, setting the Task filter will display only **Incomplete Tasks** or **All Tasks**. The setting may be changed on the **My Day** screen or in a patient chart. Once changed, it will keep the setting on all screens.

➢ **How to Access**

- My Day: Select **Customize**

- Patient Chart: Select **General** > **Patient Tasks** > **Customize**
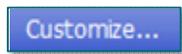
➢ How to Customize

<u>STEP 1</u>: Click **Filter** button.

<u>STEP 2</u>: Choose **filter**.

- **All Tasks** display tasks regardless of status.

- **Incomplete tasks** and **Include Tasks with no Due Date** displays incomplete tasks.

<u>STEP 3</u>: Click **OK**.