

November 20, 2024

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

Customize...

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.
- STEP 3: Click OK.



Group By F	ilter X	
<u>S</u> ort	All Tasks All complete train	
Filter	✓ Incomplete tasks ✓ Include Tasks with no Due Date Date)	
	C Incomplete Tasks that are overdue	
Warn me	OK Cancel	

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.