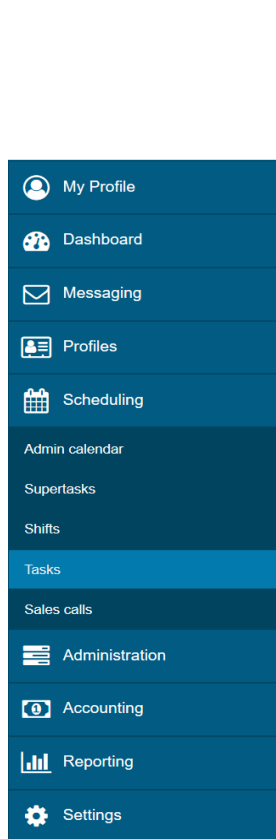


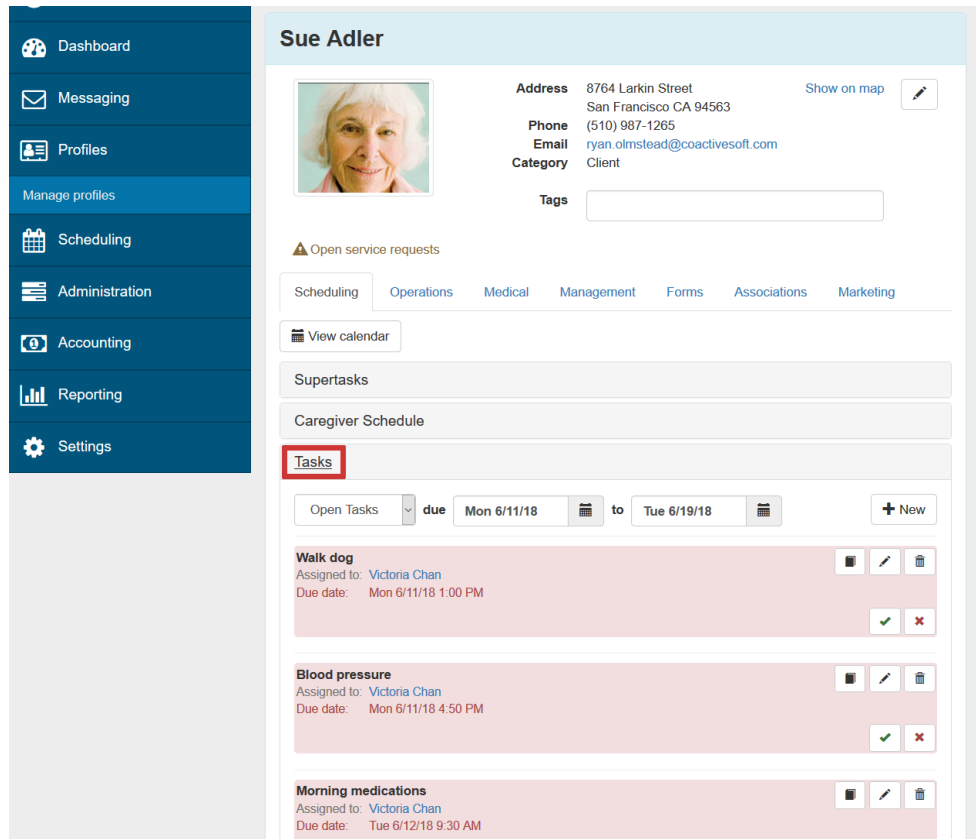
# CoActiveSoft Task Management User Manual

## Accessing CoActiveSoft Task Management

Tasks can be accessed in two ways: On the home screen, you can find task under 'Scheduling' (Figure 1). Or, you can go to a profile and access tasks there (Figure 2). You will encounter the same functionality in both places, with one difference. On the profile screen, you can create tasks to be done for that profile, but on the 'Scheduling' screen (Figure 3), you can view and edit tasks for the entire company (all profiles).



(Figure 1) Main Menu



(Figure 2) Task List

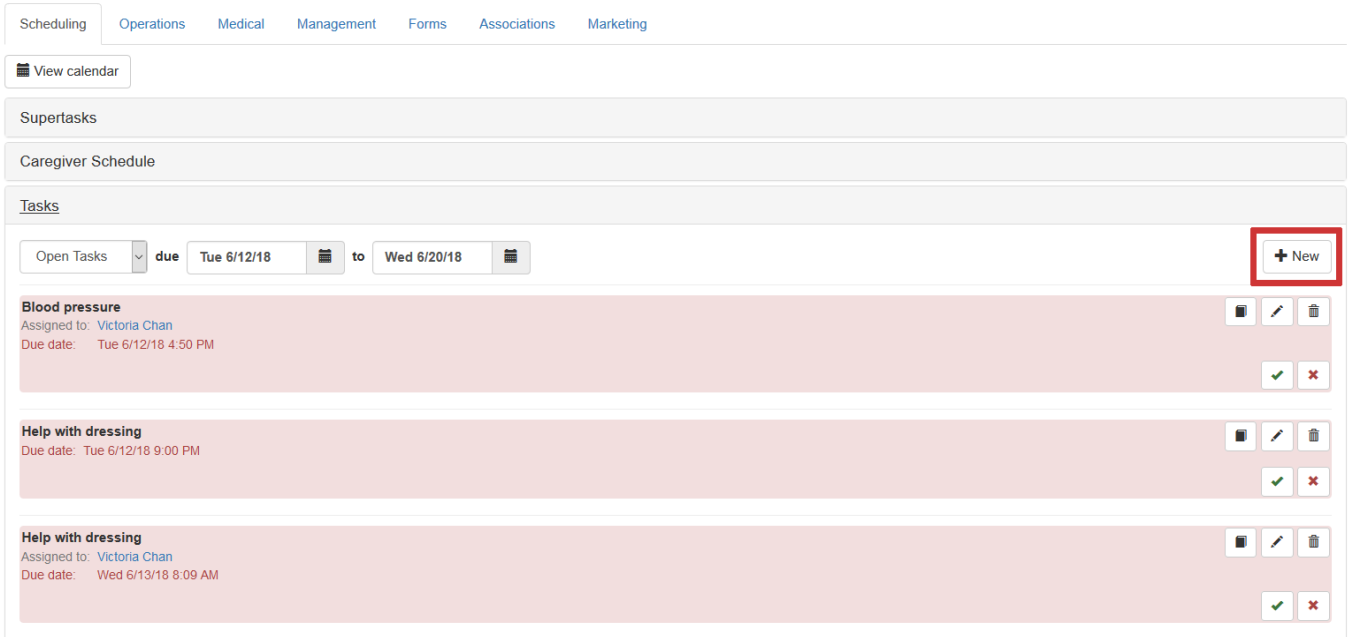


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## Create and Manage Tasks

After clicking on Tasks in the Administration section of the main menu, you will see a list of tasks that have been created. For users who use CoActiveSoft for the first time, this list will be empty. To create a new task, click on 'New', and CoActiveSoft will display the 'Add new task' screen (Figure 4).



Scheduling Operations Medical Management Forms Associations Marketing

View calendar

Supertasks

Caregiver Schedule

Tasks

Open Tasks due Tue 6/12/18 to Wed 6/20/18 + New

**Blood pressure**  
Assigned to: Victoria Chan  
Due date: Tue 6/12/18 4:50 PM

**Help with dressing**  
Due date: Tue 6/12/18 9:00 PM

**Help with dressing**  
Assigned to: Victoria Chan  
Due date: Wed 6/13/18 8:09 AM

(Figure 3) Task List



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### Add new task

**Title**

**Timezone**

**Start date**

**Due date**

**Description**

**Active**

**Enable alerts**

**Reminder**   minutes before due

**Recurring task**

**Recur interval**

**Days** Sun Mon Tue Wed Thu Fri Sat

**Recur start date**  **1**

**Recur end date**

**Assign to caregiver**  **3**

**Client Profiles**

Name	Can view	Can edit
Jackie White <b>2</b>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Figure 4) Create New Task Screen

Give the task a title and enter the start and due dates. If necessary, you can also enter a description. By default, CoActiveSoft checks the 'Active' check box. The 'Recurring task' check box is not checked by default. If you check it, you can enter the appropriate information to make the task recurring.

Everything in CoActiveSoft is centered around people. Consequently, a task has to have a client profile. The client profile is the person for whom the task has to be completed. If you create a task called 'Measure blood pressure' you will probably enter a patient as the client. It is possible to apply a task to multiple clients by simply adding multiple client profiles to the task(2). You can also select whether the client should be able to view and edit the task. By default, the "assign to caregiver" box is checked. This will automatically assign the task to the caregiver who is on duty when the task is due. If you prefer to assign a different person to the task, un-check this box and enter the assigned profile.(3).



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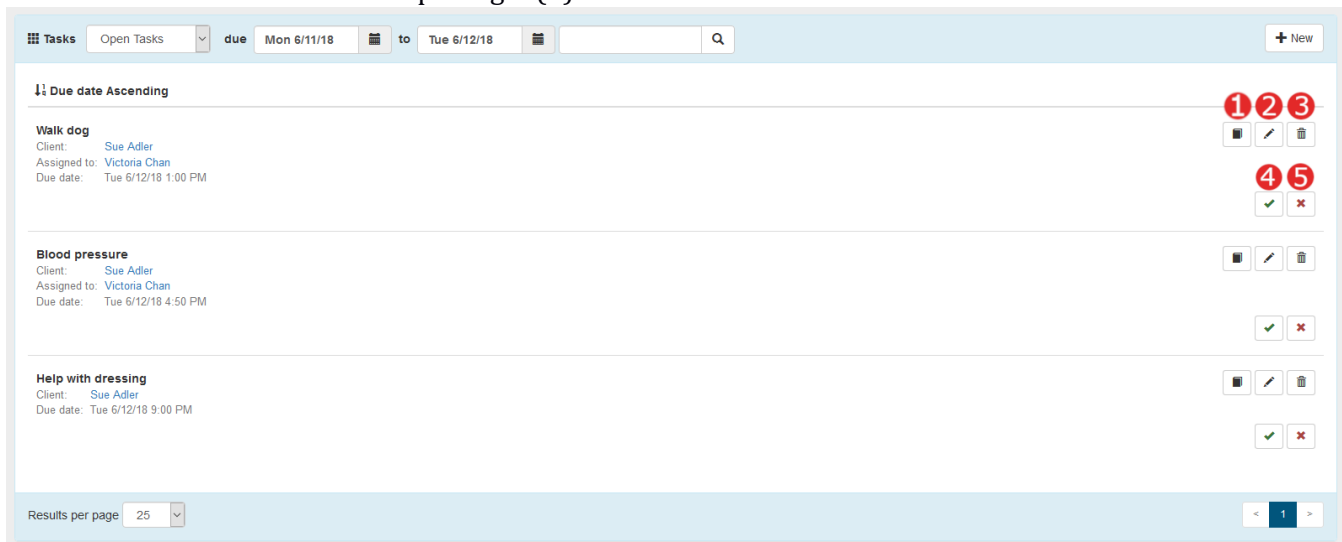
## Task Management with CoActiveSoft Management

CoActiveSoft Profile Management includes a section for task management.

In a caregiver profile, the tasks show up under 'Assigned Tasks'. In the client profile that the caregiver is assigned to, these same tasks show up under "Tasks".

Whether you are looking at tasks from the administration page or from a profile, you have the following options:

- Create a log entry (1)  
For some tasks, you may want to document the result. For example, if the provider takes the blood pressure for a patient, he may want to log what the blood pressure was.
- Edit the task (2)
- Delete the task (3)
- Mark task as completed (4)  
Note that you can only mark tasks complete that are open. That is, you can't mark a task complete that hasn't started yet.
- Close task without completing it (5)



(Figure 5) Task Management Section of CoActiveSoft Profile Manager



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