



Task Types & Messaging on the Client Portal

Quick Guide

Task Types

In Picklist Management, we have added two new columns under the Task Type Category:

- User Group assignment
- Expose Message Topic on Client Portal flag

Name	Description	Order	Active	User Group	Default	Expose Message Topic on Client Portal
Review			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Save for later			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Rx			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
File			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Test			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Crisis			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Client Ticket		1	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Daily Chart Notes	Daily Chart Notes		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Client Communication	Client Communication		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
*			<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

User Group

Assigning a User Group can specify who will receive a specific task type. Simply click the drop-down caret to select a user group.

User groups can be customized under Administration > User Management > User Groups.

Expose Message Topic on Client Portal

When checked, this flag allows the selected message topic to be exposed on the client portal.

Patients who send a message via the Client Portal will have the option to select a Message topic.

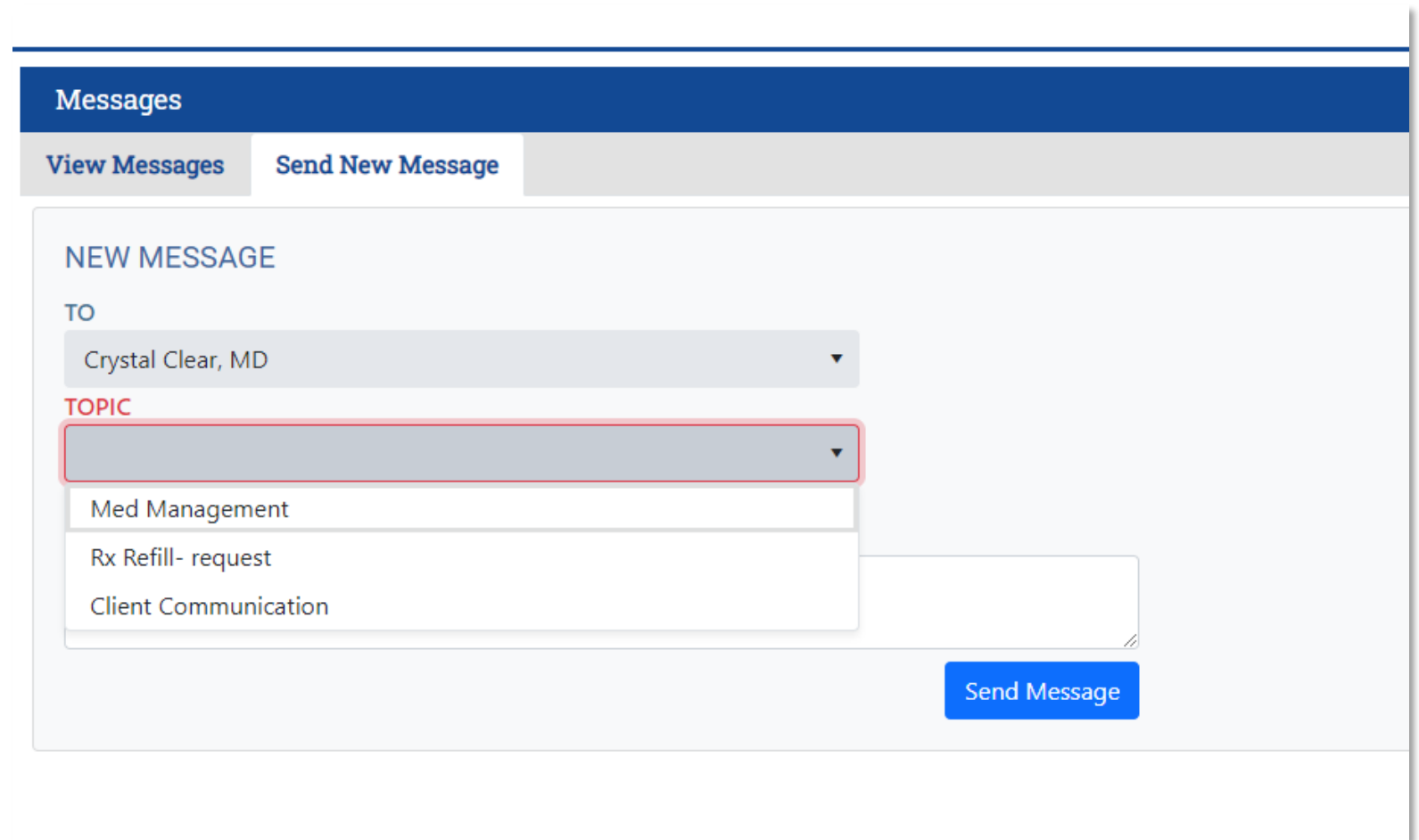
Message Topic on Client Portal

Topic Selection

The Topic drop down selection is dependent on which Topic Types are flagged to be exposed on the Client Portal via the *Expose Message Topic on Client Portal* flag.

Here, patients can select a topic type for their message, which will go to the users assigned under the user group selected for that topic type within the Picklist Management.

If a patient selects a topic that does not have a user group assigned, they will be required to select a person to send the message to.



The screenshot displays the 'Messages' section of a client portal. At the top, there are two tabs: 'View Messages' and 'Send New Message'. Below the tabs, the 'NEW MESSAGE' form is visible. The 'TO' field is a dropdown menu currently showing 'Crystal Clear, MD'. Below it, the 'TOPIC' dropdown menu is open, showing three options: 'Med Management', 'Rx Refill- request', and 'Client Communication'. The 'TOPIC' dropdown is highlighted with a red border. To the right of the 'TOPIC' dropdown is a text input field. At the bottom right of the form, there is a blue 'Send Message' button.