PIMSY

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

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.
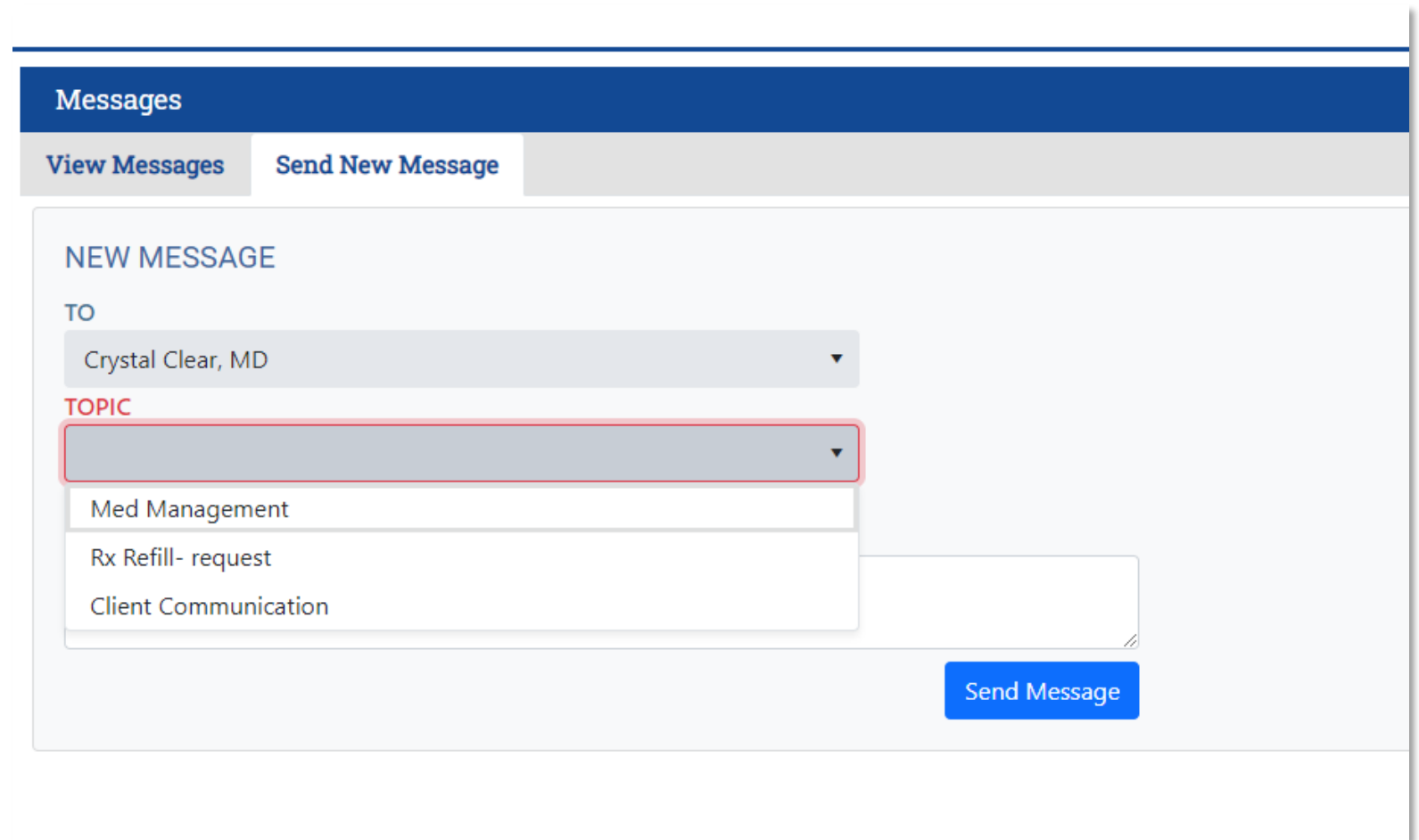
Message Topic on Client Portal

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.