Client Tasks Edit Screen

Updated on February 2017

Home > Client Management (Search Client) > Tasks > New

Business Purpose:

The **Client Management – New Tasks** page allows the user to create a new task relating to the particular Client. It may be a reminder and or an appointment with or for a client, sent to a staff.

How to:

1. From the Client Management – Tasks screen, Click New to create and assign a new task to a staff of the Program.
2. Enter a Service Date using the button.
3. Select a Service Time using the hour, minutes and seconds dropdowns.
4. Select a Priority rating for the Task.
5. Select a Program for which the Task is assigned to.
6. Select a Staff (SMIS User) in the above Program selected.
7. Select a Status for the Task (i.e. Active or Completed)
8. Enter a Message regarding the Task to be performed.
9. Click to create and assign a new task.

Important Notes: