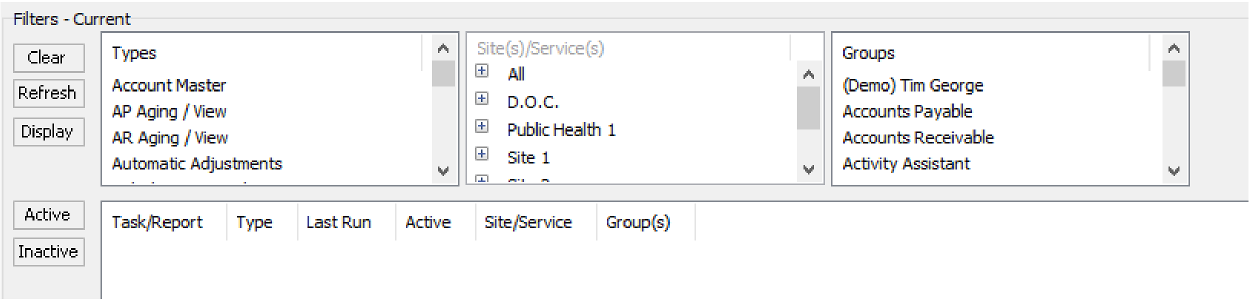
Tasks/Reports

Tasks/Reports may be utilized to determine which tasks are available to which site/services or user groups. Only the following items may be adjusted from within this screen: Site/Service, User Group, and whether the task remains Active or should be made Inactive. Tasks that may be viewed/adjusted within here are located below. The benefit to utilizing this screen to edit tasks, rather than the task the screen is made within is that within here, you may easily make global changes and see all tasks specific user groups have rights to.

Account Master	Financial Reports - Payroll
AP Aging/View	Form Maker
AR Aging/View	General Report Tasks
Automatic Adjustments	General Reports
Calculate Financial	Graph Report Tasks
Calendar	Graph Reports
Charge Master	Hybrid Task
Clear/Reconcile	MDS 3.0 Report
Clinical Calculation	MDS Report
Common Task	Payables/Adjustments
CoSign Task	RAP Review Tasks
Create HL7 Message (Interface Specific)	Receipt/Adjustment
Create HL7 Message (Universal)	RUG Forecast
Dashboard	Scheduler Task
Financial Claim File – 1500	Sign Task
Financial Claim File – 1500 (0805)	Sort Task
Financial Claim File – CA 25-1	Statistical Reports
Financial Claim File – MA 10	Template
Financial Claim File – UB04	Trigger
Financial Forms – 1500	Trigger Tasks
Financial Forms – 1500 (08/05)	View Entries Tasks
Financial Forms – MA 10	View HL7 Log Events
Financial Forms – UB04	View HL7 Messages
Financial Report Tasks	View Journals
Financial Reports – AP	Word Searching
Financial Reports - AR	Write New Entry Tasks

Getting Started

To access this screen, navigate to **American Data – ECS** > **Setup** > **Security** > **Tasks/Reports**. A three-way split screen will appear. The top is the **Filters – Current** which will allow the user to see all tasks that they also currently have access too. The middle of the screen will display the results of the search completed in the Filters – Current section. **Filters – All** may be utilized if having problems locating a task. This means that a user may not have rights to the task themselves.



Filters – Current

There are three columns to select from prior to beginning the search: Types, Site(s)/Service(s), and Groups. You may select as much, or as little, as you would like, dependent on what you need to review. Once you have selected data at least one of the top three columns, click onto Display on the left. All data related to the search will display in the middle portion of the screen. If you would like to clear the search and start over, select Clear. To update the search to display changes you may have made, click onto Refresh.

Example tasks which can be completed in this screen

- Review all reports in ECS to turn any unused ones to Inactive so they no longer display in the report list.
  - In the Types column, highlight General Reports.
  - Click Display.
  - All reports display in the middle of the screen.
  - Highlight all reports you would like to make inactive (look at the Last Run date for reference).
  - Click onto the Inactive button on the left.
- Give a user group access to several tasks which they reported they cannot access.
  - After you determine which category the tasks are in (view task, general report, calendar task, etc.), select the types within the Types column. Or complete one at a time so there is a smaller list to look through.
  - Once you have highlighted the first task, or all tasks, click onto Display.
  - The tasks will display in the middle of the screen. You may edit one task at a time or several tasks at one time (via global setups).
    - *Change one task at a time:* right click onto the task and select Edit. Once in here, add the user group by clicking the Add button to the right of the Group column. Click OK to save changes.
    - *Change several tasks at one time:* highlight all tasks you would like to change. Right click onto one of them and select Edit. This will load a global setup screen. Determine whether you will be Adding to what is already there or if you are wanting to Replace all setups (ensure the dot is in Add or Replace dependent on what you need). Make changes (noting that with global setups, you will have to click onto buttons twice to activate them). Click OK to save changes.

- View all tasks that the CNA user group has access to and remove any that are irrelevant.
    - In the **Groups** column, select the NH-CNA user group.
    - Click **Display**.
    - All tasks will display in the middle of the screen.
    - Right click onto any tasks that the group does not need access to and select **Remove**. Clicking onto Remove will only remove the task from the selected user group, it does not delete the task. If you are wanting to remove several tasks at one time, highlight all tasks before right clicking and selecting **Remove**.

Filters – All

This option is not typically utilized by end users unless they are unable to locate a task that was merged in. American Data staff will frequently utilize this option if merging in new tasks. It functions in the same manner as described above, except the tasks display directly to the right, and there is no option to narrow down based on Site/Service or Group. In addition, the user may not Inactivate or Activate tasks in the bottom portion of the screen.