

# How to Reassign or Write Off a Scheduled Task

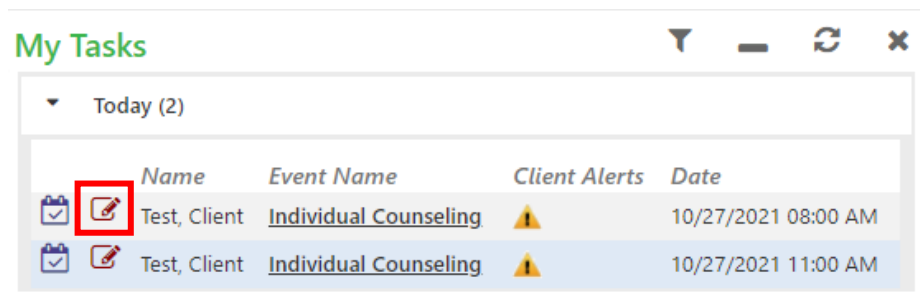
Guidance Included:

- Reassigning Tasks (Not all staff have the option to reassign tasks.)
- Write Off a Task

## From My Tasks Widget

If you have assigned tasks, they will appear on your My Tasks widget.

To edit the task, click the red icon with the pencil.

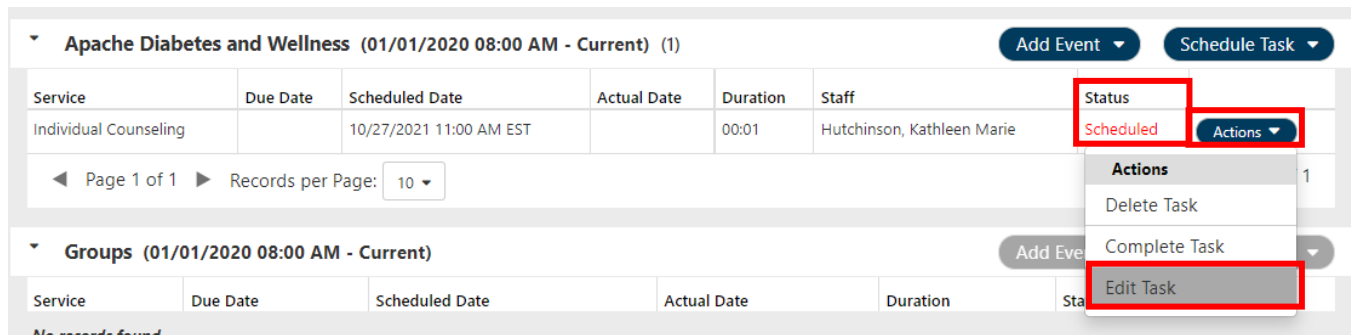


The screenshot shows a 'My Tasks' widget with a title bar containing a search icon, a minus sign, a refresh icon, and a close icon. Below the title bar is a dropdown menu set to 'Today (2)'. The main content is a table with the following columns: Name, Event Name, Client Alerts, and Date. There are two rows of tasks, both for 'Test, Client' and 'Individual Counseling' on 10/27/2021. A red box highlights the pencil icon in the first row.

Name	Event Name	Client Alerts	Date
Test, Client	Individual Counseling	⚠️	10/27/2021 08:00 AM
Test, Client	Individual Counseling	⚠️	10/27/2021 11:00 AM

## From Service Entry/Assessment/Planning

Find the scheduled event > Click Actions > Edit Task



The screenshot shows a table with columns: Service, Due Date, Scheduled Date, Actual Date, Duration, and Staff. The first row is for 'Individual Counseling' on 10/27/2021 11:00 AM EST, staffed by 'Hutchinson, Kathleen Marie'. The 'Status' column shows 'Scheduled' and the 'Actions' dropdown menu is open, showing options: 'Delete Task', 'Complete Task', and 'Edit Task'. A red box highlights the 'Status' column and the 'Edit Task' option.

Service	Due Date	Scheduled Date	Actual Date	Duration	Staff	Status
Individual Counseling		10/27/2021 11:00 AM EST		00:01	Hutchinson, Kathleen Marie	Scheduled

# How to Reassign or Write Off a Scheduled Task

## Reassign task

- Staff Responsible: Use binoculars to select a new staff responsible for ensuring the task is completed.
- Save to apply changes to task.

Client Related Task by Staff Responsible [EDIT]

Client: Test, Client DOB: 01/01/1980 ID# 00000002 Intake: 01/01/2018 08:00am

Save Cancel Delete Print Send Alert History Refresh Form Info

**Task**

Created By: Hutchinson, Kathleen Marie Client\*: Test, Client Activity\*: Individual Counseling Program Responsible\*: OLP Online Counseling

Facility Responsible\*: 00002 Eagle Building (Lic.# 00002) Staff Responsible\*: Antonio-Edwards, Shanna

Outside Provider Organization Contact Information

Send Alert?

## Write Off a Task

Scroll to the Task Completion section.

- Click Write Off/Cancel.
- Select Reason for Write Off/Cancel
- Save to apply changes to task.

Check In/Check Out

**Task Completion**

Additional Information

Actual Event Task Completed Write Off/Cancel Reason for Write Off/Cancel\*