


Sent Oct 28, 2014



HOWTO correctly respond to Task in CaseTrakker

Always create a completely new task when responding to task sent to you. This can be done by clicking the  green check mark from the original task and entering all the necessary information for this new task including your comments in the **NOTES** section.

Never respond to a task by changing the name in the To: field of the original task to the recipient's name and adding your response to the Notes section of the original task.

Example of Incorrect way to respond to a task:

Originally April King sent Amy Nash (ANash) a task, but if you look below, it appears as if April sent a task to herself when in actuality she didn't. This example shows how Amy responded to April's original task by changing the name in the To: field from her name to April's and adding comments below April's original Notes entry. Amy should have responded to April's original task by creating a completely new task from the green check mark.

The screenshot shows a task window titled "Task for April King" with a status of "Complete". The task details are as follows:

- Task about:** MARTA ROAD
- From:** April King
- Created On:** 6/30/2014 12:49:39 PM
- Status:** Complete
- Created Date:** 6/30/2014 12:49:40 PM
- To:** KING, APRIL - April King
- Assigned Date:** 06/30/2014
- Due Date:** 06/30/2014
- Task Type:** Case Review
- Notes:** FYI - Functional Assessment assessed member as being a level 2 due to the implementation of PERS and homemaking services. Please amend. ~April King
****All set April, thank you! ANash****
- Next Task Information:** Click here to schedule your next task

Annotations in the screenshot include:

- A red arrow pointing to the green check mark icon with the text: **Always click to create a completely new task**
- A red arrow pointing to the "To" field with the text: **Never change the name in the To: field**
- A red arrow pointing to the "Notes" section with the text: **Amy's response should be in a completely new task to April King**