May 27 - Task Management

This video provides an overview of managing clinic tasks using the "follow-ups" and "to-dos" modules.

Follow-ups: Must be enabled manually via **System Settings > System and Company Settings > General > Modules**. Once enabled, a "follow-ups" tab appears on the main screen.

To-dos: These are enabled by default.

Categories and Templates: Clinics can organize follow-ups by creating categories (e.g., "no shows," "recalls") in system settings.

Feature Title: Follow-ups and To-dos Modules

Problem Solved

Clinics often struggle with managing administrative task visibility, resulting in dropped patient communication, forgotten clinical charts, unaddressed no-shows, and missed billing collections.

Core Functionality

The system divides tasks into two separate paradigms:

- **Follow-ups:** Broad, team-based tasks designed for shared clinic workflows (e.g., recalls, cancellations, accounts receivable). While assignable to individuals, any team member with authorized access can view and complete them to prevent gaps in coverage.
- **To-dos:** Individual, person-specific or role-specific tasks (e.g., reminding a practitioner to finish charting or contact a physician) that are restricted to the assigned user.
- **Meetings Action Type:** A sub-feature within To-dos used to generate a block across the schedules of multiple practitioners for occurrences like staff meetings.

Technical Implementation / Config

Module Activation

Follow-ups must be manually turned on via the UI. To-dos are enabled by default.

- Navigate to: `System Settings` > `System and Company Settings` > `General` > `Modules` > `General` > **Follow-ups** (Toggle to Enable).

Categorization and Colors

- Configure custom operational categories and default timeline delays at: `System Settings` > `Groups and Categories` > `Follow-up Categories`.
- An option to assign visual color codes is available here to help organize the primary Follow-ups UI dashboard view.

Task Templates

To pre-populate memo information and standardized instructions for tasks:

- Navigate to: `System Settings` > `System Entities and Types` > `Task Template`.
- Click **New Task Template**, enter a name, and complete the boilerplate instructions in the text editor.

Dashboard & Preferences Configuration

- **Lookahead Window:** Control how many days in advance a user can see tasks via `User Profile` > `Preferences` > Set lookahead window (e.g., 5 days, 10 days).
- **Default Landing Page:** Change the main login screen to go straight to the agenda via `User Profile` > `Preferences` > Set default dashboard tab to **Agenda**.
- **Agenda View Filtering:** Consolidate duplicate task lines by navigating to the dashboard's `Agenda` tab, clicking the **Cog Icon**, and disabling standalone To-dos and Calls lists while keeping the **Follow-ups** view active (which rolls all three types into a singular view).

> **Caveats & Limitations**
> Reporting Deficit: There is no dedicated reporting module or log available for tracking or auditing completed follow-up and to-do tasks. If a task is completed accidentally, users must manually find the specific patient profile and navigate to `Correspondence` > `Follow-ups and To-dos` to revert or reinstate it.
>
> Meeting Analytics Metric Inflation: Utilizing the "Meeting" action type creates a generic gray block on practitioner schedules, but the system technically processes these blocks as patient appointments. As a result, staff meetings will inflate metrics in reporting/statistics modules, requiring manual subtraction from total metrics.
>
> Template UI Variances: Task templates automatically present a clean drop-down list inside the Follow-up interface, but within the To-do setup interface, users must manually type out the template name to find it.
>
> Access Control Dependencies: Follow-up visibility relies completely on matching `Clinic`

> `Access` and `Practitioner Access` configuration permissions within a user's staff profile.

> **Best Practices**
>
> End-of-Day Schedule Audits: Front desk or administrative staff should review the daily schedule at the end of each shift. Use the scheduling screen's built-in **Filters** to identify cancellations or no-shows that lack a blue clock icon (which signifies an existing future appointment) and proactively generate follow-up entries for them.
>
> Reviewing Exit Reasons: Run the `Reports` (Graph Icon) > `Scheduling` > `Cancellations by Practitioner` report to review the state reasons for cancellations before assigning follow-ups, preventing unnecessary outreach to patients who have moved or permanently left the clinic.

Keywords: Juvonno, Follow-ups Module, To-dos Configuration, Task Templates, Clinic Task Management

Searchable Summary: juvonno-followups-todos-module-configuration-guide.md

Source: https://drive.google.com/file/d/1386Bh4cVmxRUdIetksPhlpTbC4z3jHPU

Revision #5
Created 2026-06-29 19:15:24 UTC by Admin
Updated 2026-07-13 15:34:15 UTC by Admin