

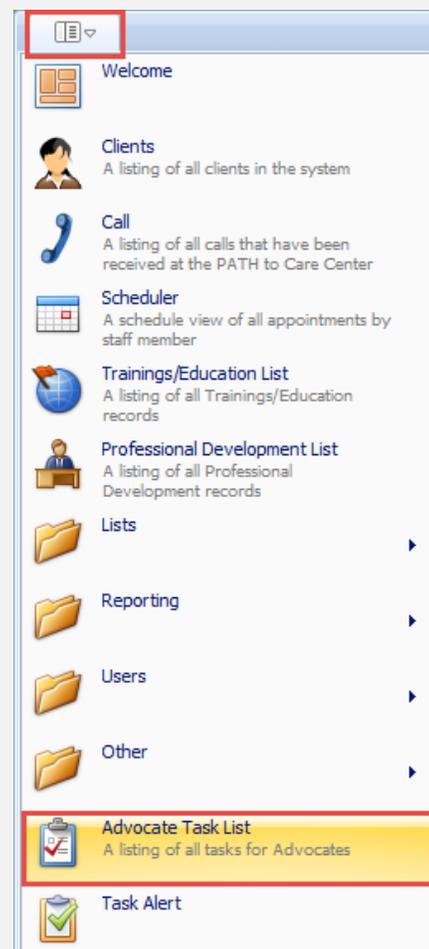
Adding Tasks and Alerts

A task is a reminder or an item of work that can be assigned to *os-soft* users. Assigned tasks are visible on the Advocate Task List and can include a due date, description, and a reminder that will pop-up at a specified time.

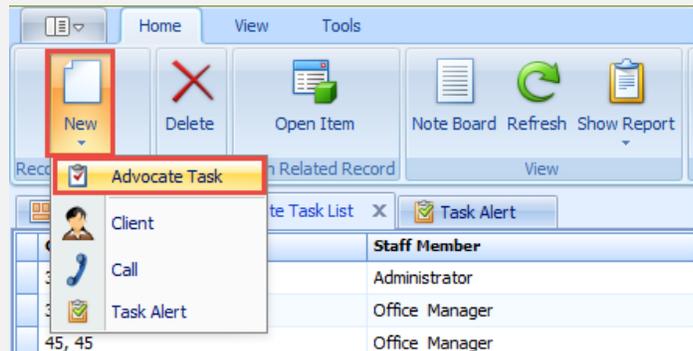
Tasks can be associated with clients and include a category and status to allow for quick recognition of completion. Task Alerts can be set with a reminder that will pop-up when the software is open on the specified user's screen at the designated time. Alerts can be snoozed or dismissed by the user. You can also assign task alerts to multiple staff members.

To create a new Advocate Task List item:

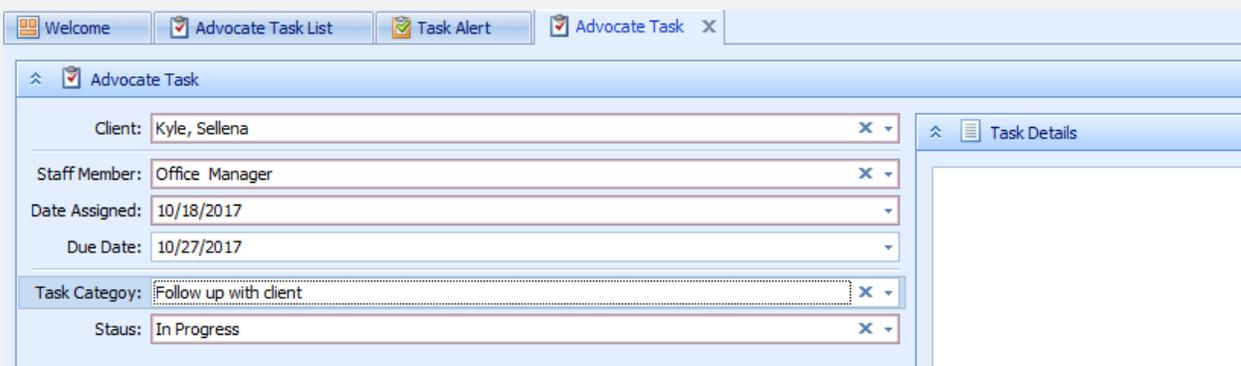
1. Select Advocate Task List from the main menu.



2. On the Advocate Task List tab, select New from the Home ribbon, then choose Advocate Task



3. Complete the task details to create the Advocate Task.



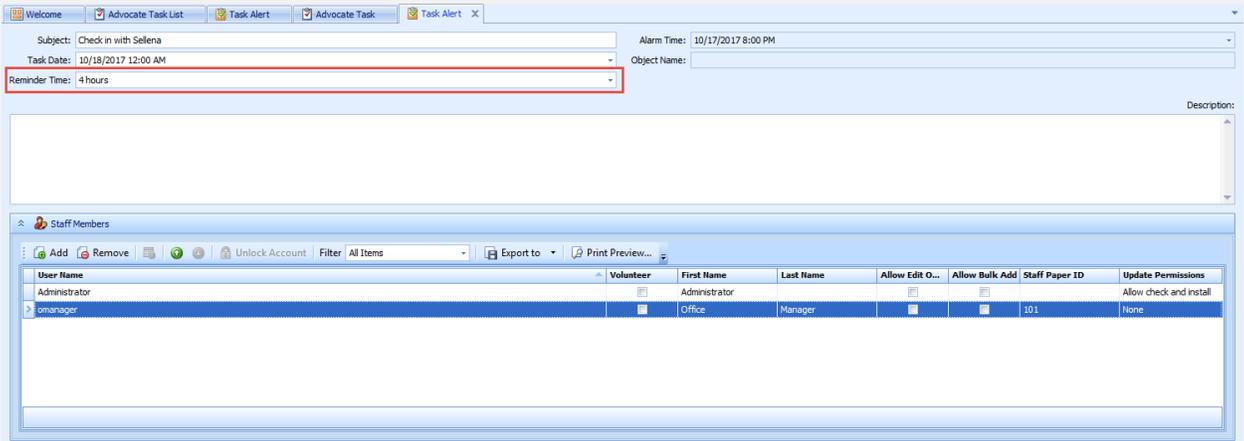
4. Save and Close the tab.

To create a new Task Alert:

Creating a Task Alert can be done from the Advocate Task List or the Task Alert list.

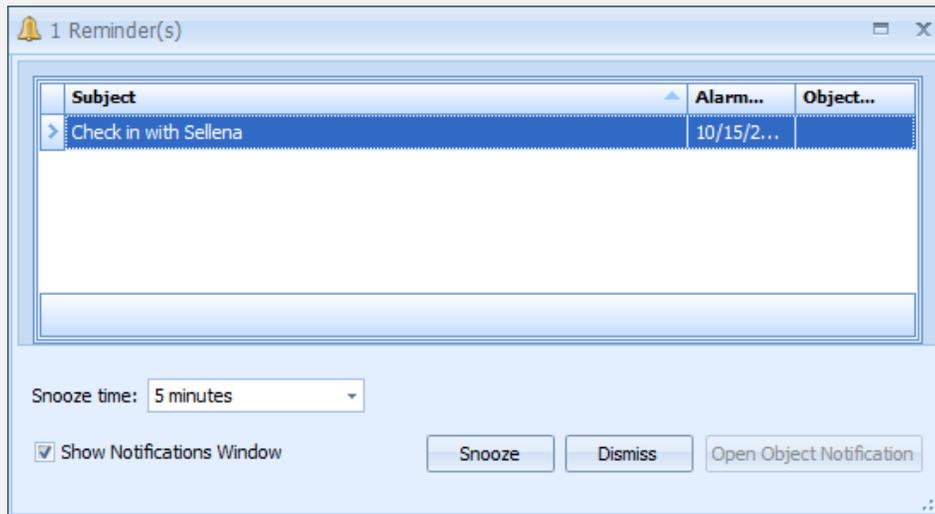
1. Select Advocate Task List or Task Alert List from the main menu.
2. Click on New in the Home ribbon and select Task Alert.
3. Complete the Task Alert details including setting a reminder if desired.

4. Select any staff members to associate with the task reminder.



5. Save and Close

6. The user associated with the task reminder will receive a notification pop-up in os-soft once the time set for the reminder has passed.



7. The user can Dismiss or Snooze the alert.