Managing work items (Guide)

As a client services representative (CSR) or solutions delivery specialist (SDS), the patient profile is where you can create and manage new work items. To view the Work items page as a resupply user, from the **Patients** menu, select **Work items**. Resupply users can close work items on the Work items page.

Note: The functions available to a user are determined by their role.

Creating work items (Topic)

You can create work items using two different methods.

To create the work item, you can perform one of the following methods:

- Create work items one at a time
- Automatically create a work item

Note: The functions available to a user are determined by their role.

Creating work items one at a time (How to)

As a client services representative (CSR) or solutions delivery specialist (SDS), you can create a work item from a patient profile.

To create the work item:

1. From the **Patients** menu, select **All patients**.
2. Select the patient name from the list.
3. Click the **Patient details** link.
4. Click the **New work item** button.
5. From the drop-down list, select the type of work item.
6. In the **Details** field, enter relevant patient information relating to the work item.
7. Click **Save**.

Automatically creating work items (How to)

You can automatically create a work item using the call script.

To automatically create the work item:

1. From the **Patients** menu, select **All patients**.
2. Select the patient name from the list.
3. Click the **Patient details** link.
4. Click the **Open call script** button.
5. Read the questions to the patient, and record their answers.
   Note: A work item may be automatically created based on the recorded answers.
6. Once you complete the call script, click **Done**.

Closing work items

On the **Work items** pages, you can close work items using two different methods.

To close work items, you can perform one of the following methods:

- Close the individual work item
- Close multiple work items at once

Note: The functions available to a user are determined by their role.

Closing individual work items (How to)

You can close an individual work item from the **Work items** page.

To close the individual work item:

1. From the **Patients** menu, select **Work items**.
2. Select the check box next to the work item.
3. Click the **Close selected items** button.

Closing work items in bulk (How to)

You can close work items in bulk from the **Work items** page.

To close work items in bulk:

1. From the **Patients** menu, select **Work items**.
2. Select the check boxes next to the work items.
3. Click the **Close selected items** button.
4. (Optional) Enter a note in the text field for future reference.
5. Click **Close**.