

# Communication Release

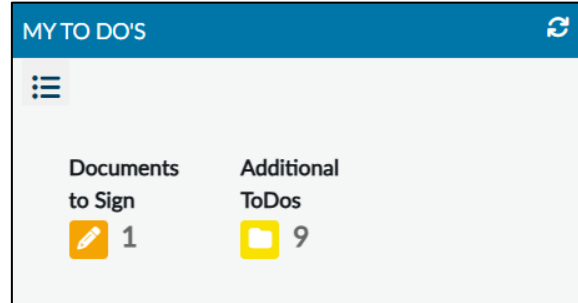
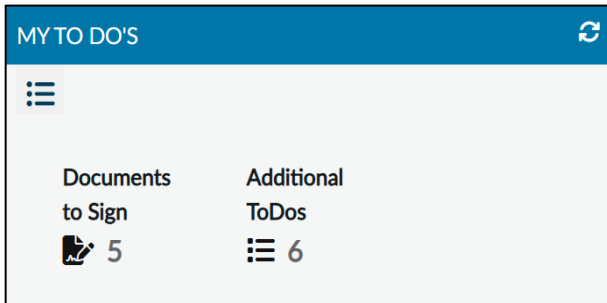
1/22/2025

## The MY TO DO'S Widget is Getting a New Look

On Thursday, January 23<sup>rd</sup> SAPC is implementing changes to the Sage system that will change the appearance of the MY TO DO'S Widget on the myDay view. These changes do not impact the functionality of the navigation buttons; however, it is worth noting the changes. Users will see the below changes by start of business on 1/23/2025.

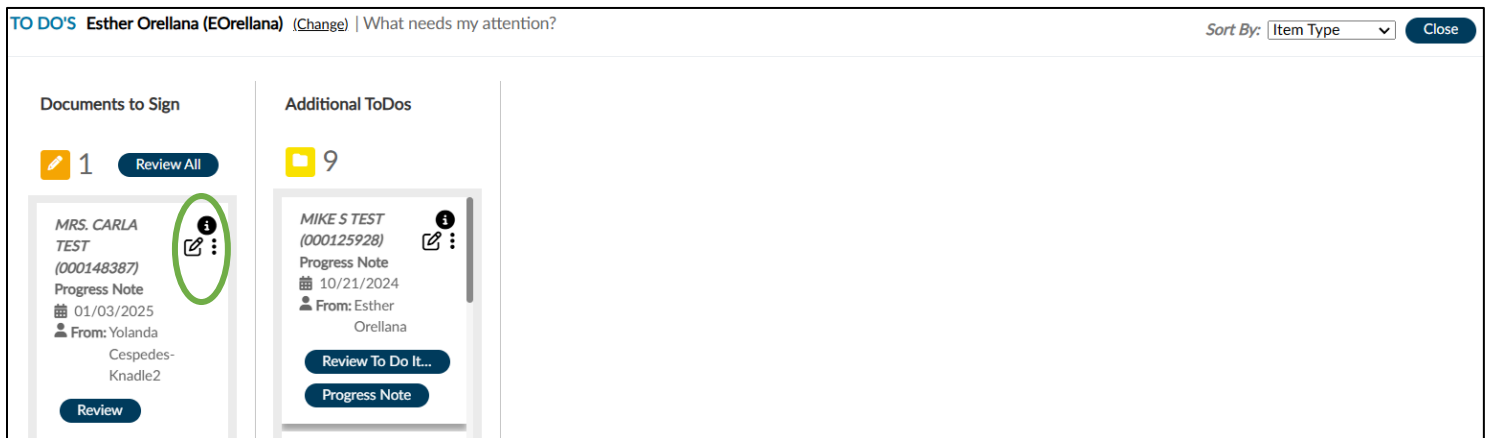
**New MY TO DO'S Widget:**

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Currently, the MY TO DO'S Widget only offers a “Board” display of Documents to Sign and Additional ToDos in column format. Following the update, users will see a “List” format which will be the new default. Each user can switch between the List and Board views depending on their individual preference by clicking on either the word List or Board.

**BOARD VIEW - Old version with navigation icons to the right of the patient's name in each column:**



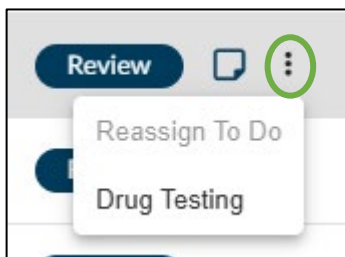
## LIST VIEW - New version with navigation icons under the "Action" and "Review All" columns:

The screenshot shows a web interface with a 'List' view. On the left, there are two sidebar items: 'Documents to Sign' with a count of 5 and 'Additional ToDos' with a count of 6. The main area has a search bar for 'Client Name' and filters for 'Form', 'From', and 'Sent'. Below the filters is a table with the following data:

Client Name	Form	From	Sent	Action	Review All
CHELLIE PCNX	Progress Note	Daniel Szuhay	06/04/2024	Review	⋮
ESTER M PCNX	Progress Note	Daniel Szuhay	06/04/2024	Review	⋮
CHELLIE PCNX	Progress Note	Daniel Szuhay	06/03/2024	Review	⋮
DAVID PCNX	Progress Note	Esther Orellana Provider	06/03/2024	Review	⋮
DAVID PCNX	Problem List/Treatment Plan	Esther Orellana Provider	06/03/2024	Review	⋮

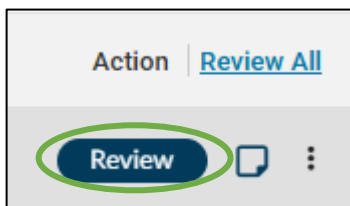
To open an Additional ToDos (forms the user has in draft):

1. Click the three dots icon
2. Select the form name, which will open the draft form directly for the user to review and finalize.
3. "Reassign To Do" is disabled and greyed out as Sage is not configured for this.  
\*\*\*Reminder\*\*\* DO NOT use the Review button under Additional To Do's as that will not finalize the document.



To open Documents to Sign:

1. Click the "Review" button to open the Document Preview and approval screen. Then follow the standard approval process.



Additionally, the List view allows the user to filter and sort the rows by client name, form name, from user or date sent. The default sort is based on the date "Sent" in descending order.