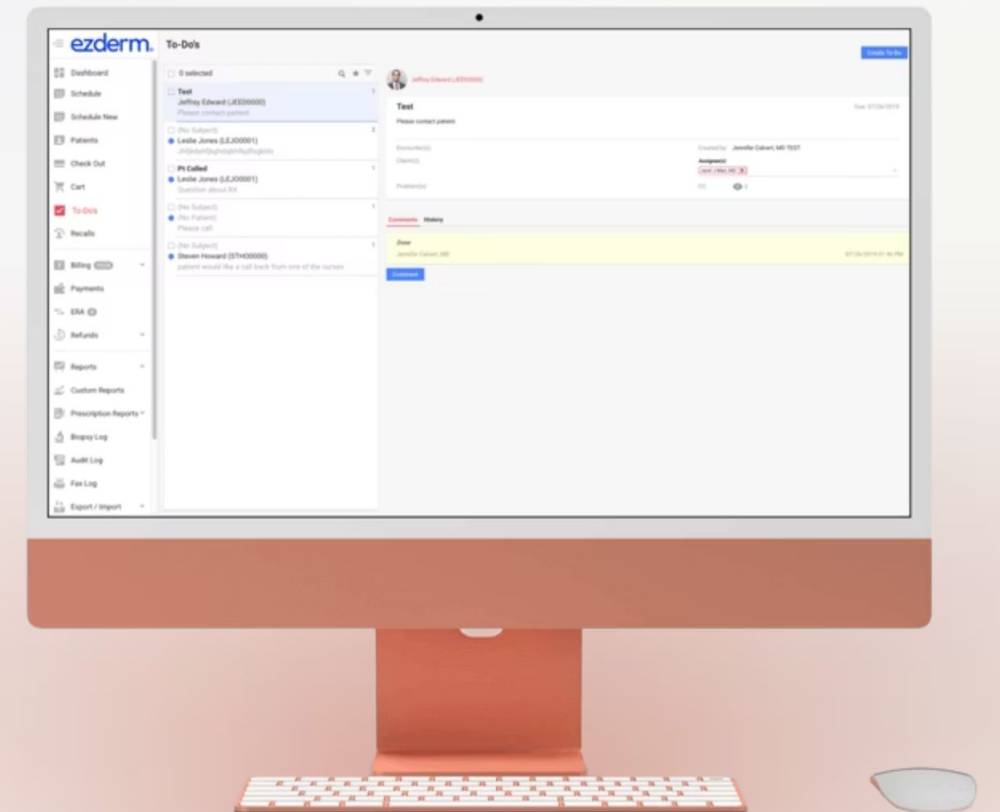


# Ezderm

# To-Dos

# Webinar

Understanding and Using  
To-Dos within Ezderm



# How Ezderm To-Dos

## Work

### **An Admin Tool for Task Management**

Use Ezderm To-Dos to efficiently manage and track administrative responsibilities and office-related tasks directly within the system.

### **Communication Management**

The To-Do feature centralizes interoffice communication by allowing staff to create, assign, and monitor patient-related tasks such as prescription refill requests, appointment requests, and other follow-ups. By keeping all task communication organized in one place, your team can improve accountability, reduce missed requests, streamline workflow efficiency, and ensure timely responses to patient needs.



# To-Dos: Best Practices

Master your task management by following these best practices and avoiding common pitfalls.

## ✓ Best Practices

- Use To-Dos for administrative and operational tasks
- Assign tasks for Rx refill requests, appointment requests, and patient call-backs
- Clearly document what action is needed and by whom
- Set deadlines to ensure timely follow-up
- Update or close tasks once completed
- Use To-Dos for internal staff communication regarding workflow

# What's New in To-Dos?

Discover the latest features designed to boost your productivity and simplify your day.

## Content Control & Accuracy

**Delete To-Do:** Remove incorrectly entered or outdated items

**Edit Messages:** Correct errors in previously sent messages

**Remove Attachments:** Delete accidentally uploaded or incorrect files

**Edit & Delete Comments:** Update or remove comments to keep information accurate

**Preserve Assignee & CC Order:** Assignees and CC recipients remain in the exact order you select them

## Enhanced Filters & Workflow

**CC'd To Me filter:** Shows To-Do's where the user is CC'd

**Assigned + CC'd To Me filter:** Shows To-Do's where user is either assigned or CC'd

**Custom Default Filters:** Save your own default filter, synced across systems

**Enhanced Custom Filter:** Filter To-Do's by users added in CC

**Multi-User Assignment:** Assign To-Do's to multiple users at once

**Editable To-Do Subjects:** Edit the subject line of incomplete To-Do's

**Create Reminder from a To-Do:** Convert a To-Do into a reminder quickly

# The Future of Our

## To-Dos

Get ready to upgrade your productivity with exciting new features and advancements designed to streamline your workflow like never before.

### Upcoming Features

- Allow replacing of assignee
- To-do activity log which will allow you to view previous modifications to subject, message, attachment and comment
- To-do Manage save as favorite custom filter
- Biopsy results templates - Expand list on assignee and CC fields to include active and inactive users
- To-do improve add comment function where you can see the full text of a previous comment or comments



# Questions?

We're here to help. Feel free to ask anything about our To-Do Functionality.



# Thank

# You

Thank you for joining us today to explore our To-Do functionality. We hope this session has been valuable for your workflow.

---

