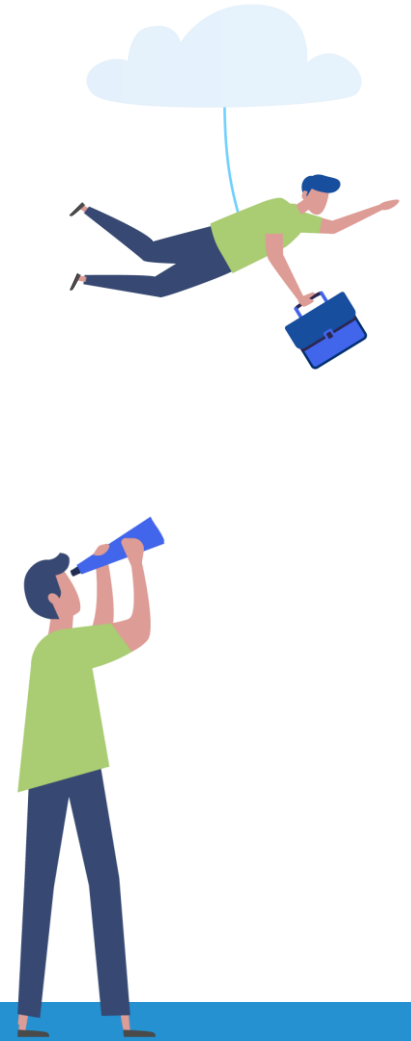


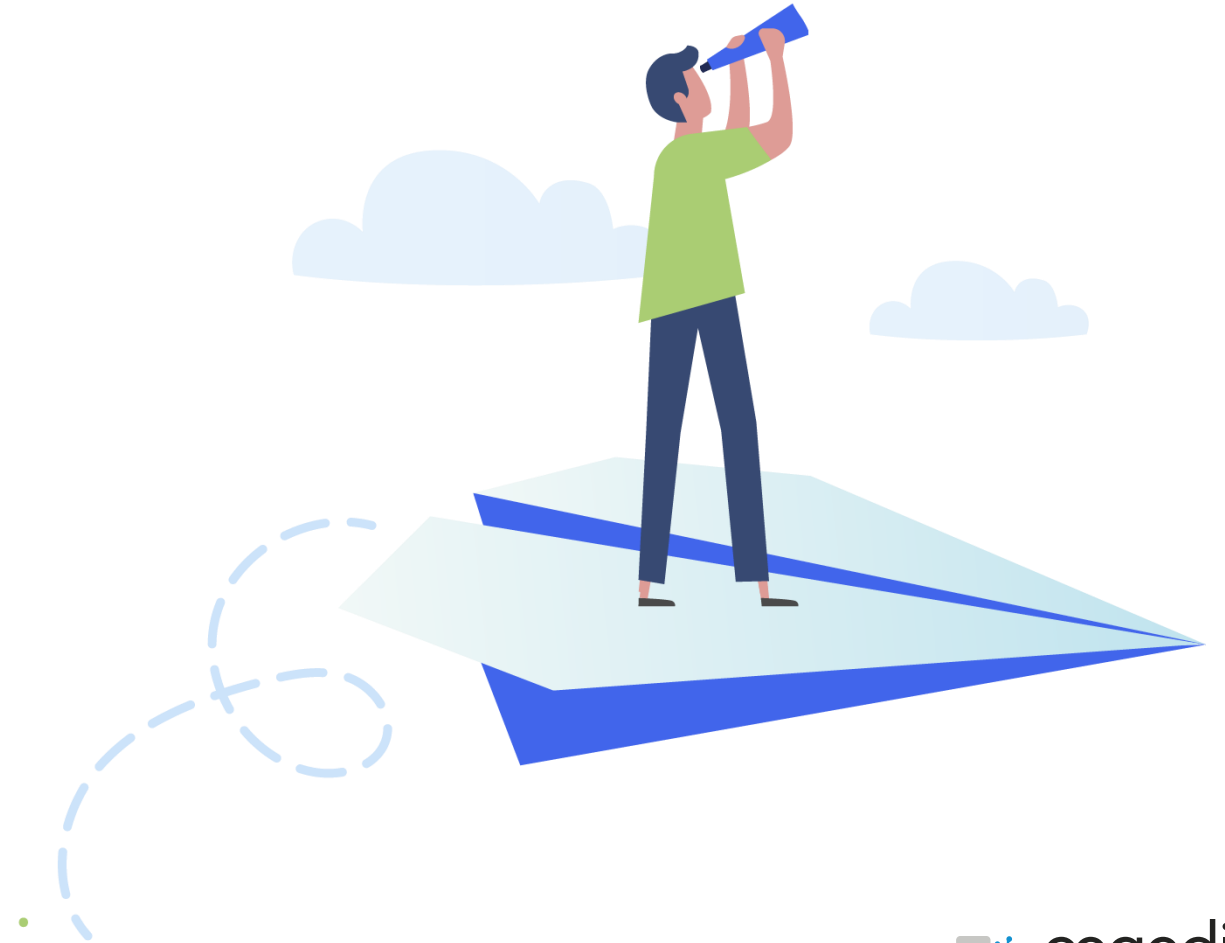
**cegedim**  
Healthcare Solutions



**Tasks Release 1.9**

# Comparing Daybook to Vision Tasks

This comparison guide is designed as a quick overview of the differences between using **Vision 3 Daybook** and **Tasks** as your task management system.



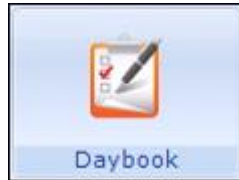
# Comparing the old to the new

## Accessing Vision Tasks

### Daybook

Select either

- **Daybook** from the **Vision 3** front screen:



Or

- Select a task from the **My Daybook Tasks** pane:



### Tasks

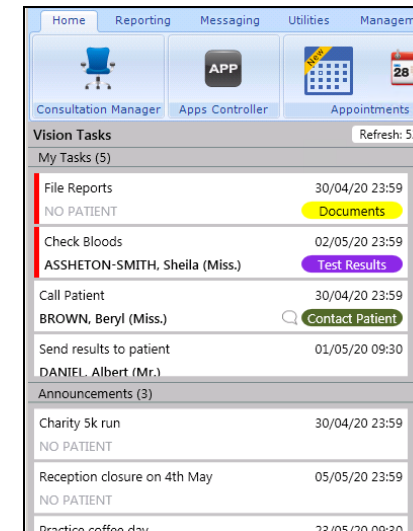
Select either

- **Tasks** from the **Vision 3** front screen:



Or

- Select a task from the **My Tasks** pane:



# Comparing the old to the new

## Notification of Tasks and Announcements

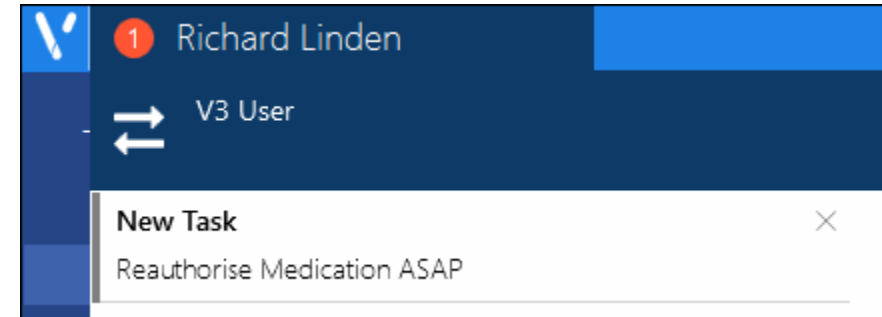
### Daybook

- Relies on you spotting new tasks from the **Vision 3** front screen or from the **To do** screen.



### Tasks

- Once **Tasks** is open, notifications display on the user profile:



- A single click on the user profile and notifications display.
- A red alert displays on **Tasks** on the bottom toolbar to notify you if you have **Tasks** running in the background:

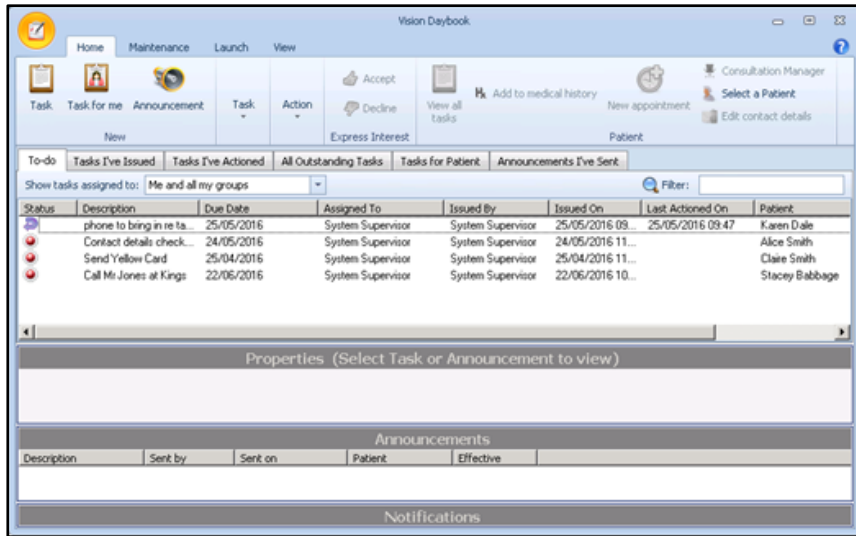


# Comparing the old to the new

## Main Screen

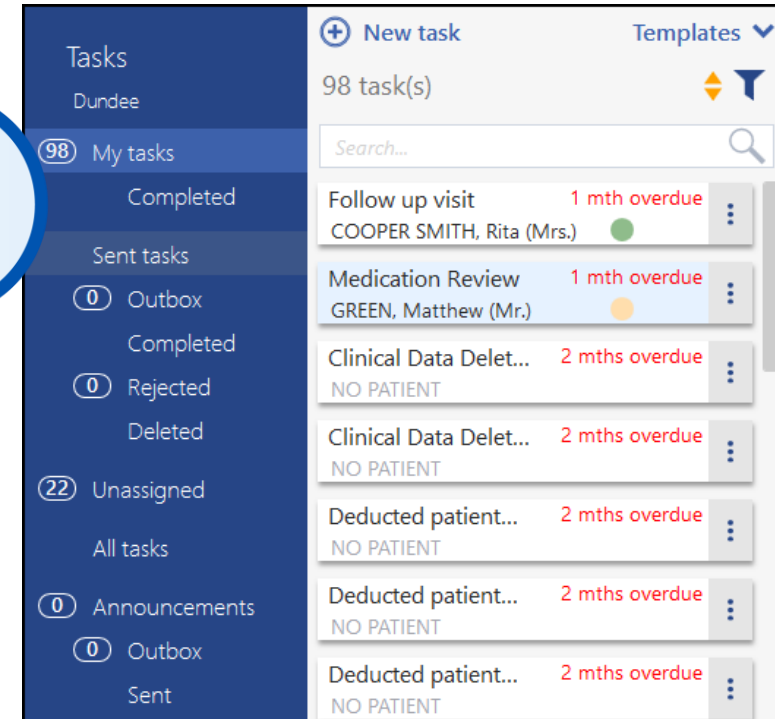
### Daybook

- Select the task you want to view:



### Tasks

- Select the task you want to view:

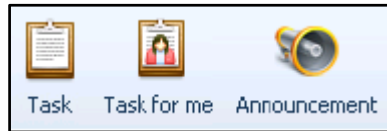


# Comparing the old to the new

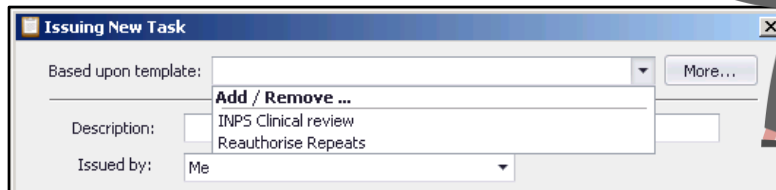
## Creating a Task

### Daybook

- Select the type of task you want to create:

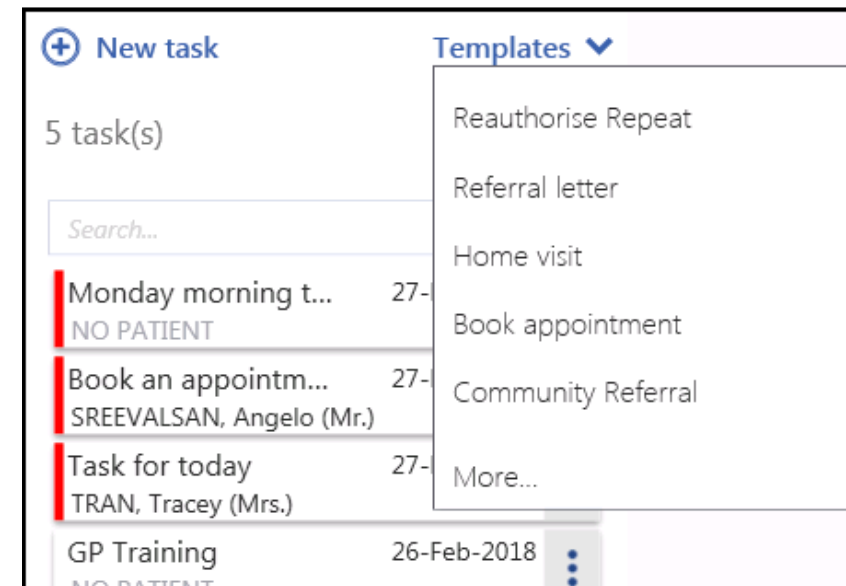


- To select a **Template**, choose from the list or select **More...** from within the task:



### Tasks

- Select **New task**  to create any type of task.
- Select **Templates**  to select from your template quick list:



# Comparing the old to the new

## Creating and Receiving Task from other Organisations

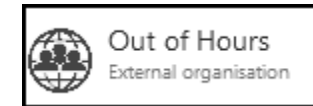
### Daybook

- Not possible, this must be done outside of your clinical system and then where appropriate recorded to the patient record.

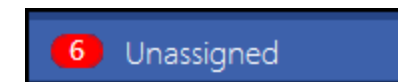


### Tasks

- **Sending tasks to other organisations** - Select the other organisation from the **Recipient** list:



- **Receiving tasks from other organisations** - Tasks received display in **Unassigned** for allocation by system administrators:



- **Note** - A **Sharing Agreement** must be set up before this facility is available.

# Comparing the old to the new

## Populating a Task

### Daybook

**Issuing New Task**

Based upon template:  More...

Description:

Issued by:

Attached to patient: [Alice Smith](#)

On completion, add to medical history

Attached to document

Notify me, when task is complete

Due:  at:  :

Priority:  Urgent  No priority escalation  
 Routine  Escalate priority, if not completed by:   
 Low

To:

Comments:

### Tasks

**New Task**

From Richard Linden ( [Edit](#) )

Recipient(s) Required

Subject Required  
 30

Description  
 1000

Please note: you may not edit or delete attached patient links once they have been saved to a task

Attachments

Category    Due Date/Time  Required

This task is sensitive  Urgent  Make urgent when overdue

All recipients must complete

Notify me when complete

Create another



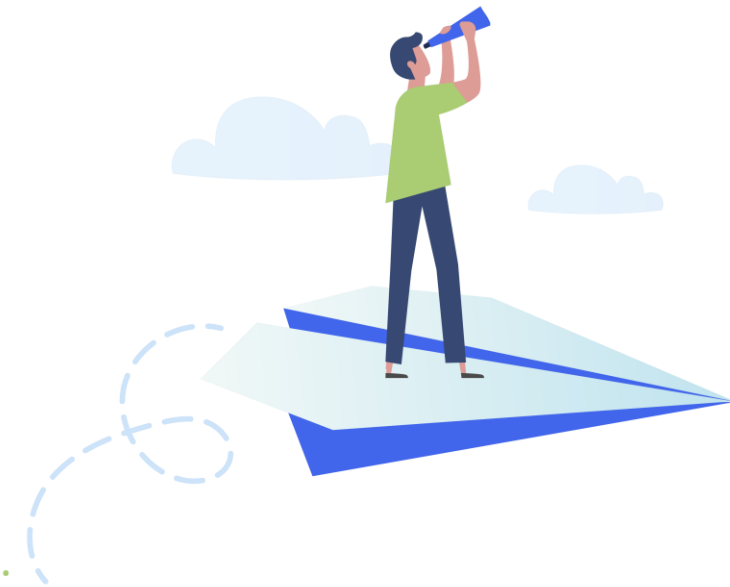
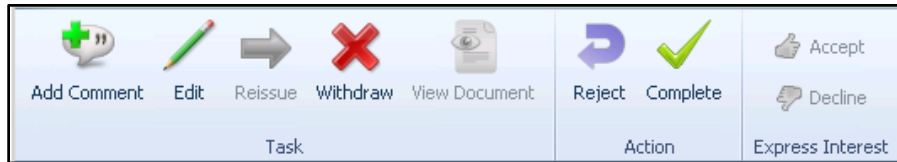


# Comparing the old to the new

## Processing a Task

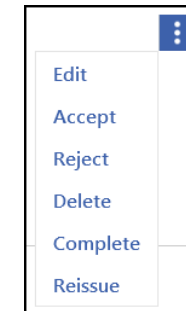
### Daybook

- Select the task you want to process:

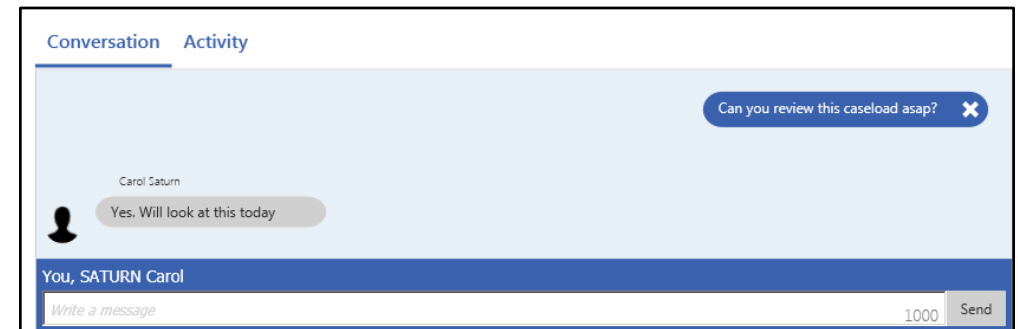


### Tasks

- Select  to edit, reject, delete or complete the selected task:



- Or use **Conversation** to send a message to the task originator and/or **Activity** to record action taken:



# Comparing the old to the new

## Viewing an Attachment

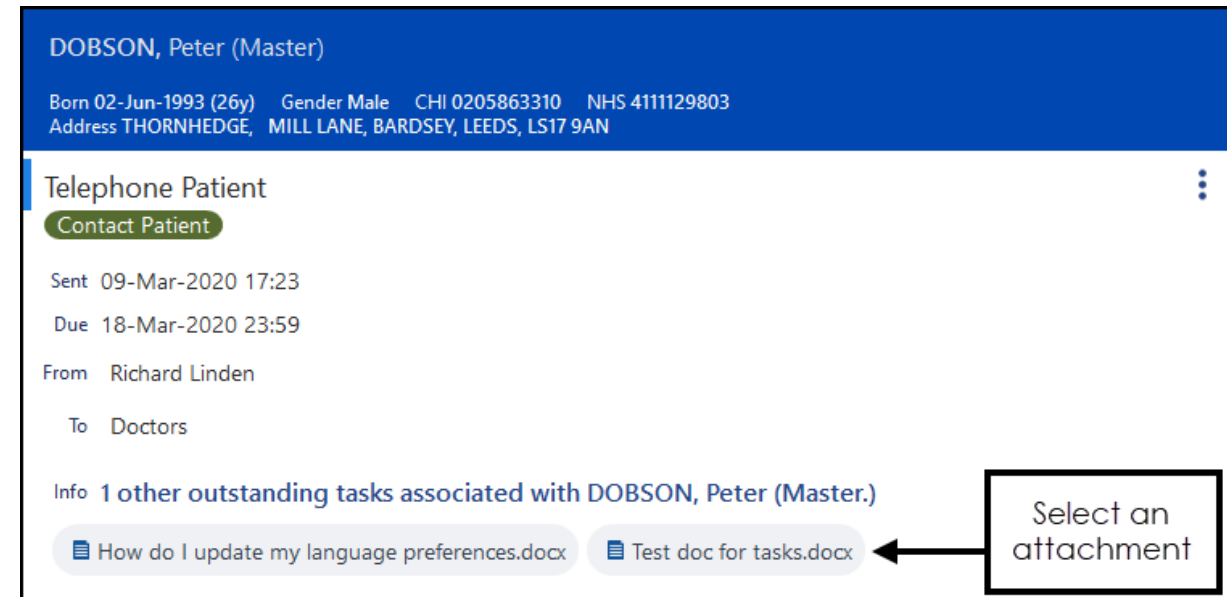
### Daybook

- From the task, select **View Document**:



### Tasks

- With the task highlighted on the left, select the attachment to view it:



DOBSON, Peter (Master)

Born 02-Jun-1993 (26y) Gender Male CHI 0205863310 NHS 4111129803  
Address THORNHEDGE, MILL LANE, BARDSEY, LEEDS, LS17 9AN

Telephone Patient

Contact Patient

Sent 09-Mar-2020 17:23  
Due 18-Mar-2020 23:59

From Richard Linden

To Doctors

Info 1 other outstanding tasks associated with DOBSON, Peter (Master.)

How do I update my language preferences.docx Test doc for tasks.docx

Select an attachment

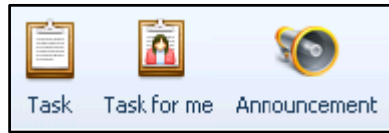
The screenshot shows a patient profile for Peter Dobson. Under the 'Telephone Patient' section, there is a 'Contact Patient' button. Below this, there is a list of tasks. One task is highlighted, showing it was sent on 09-Mar-2020 at 17:23 and is due on 18-Mar-2020 at 23:59. The task is from Richard Linden to Doctors. Below the task list, there is an information box stating '1 other outstanding tasks associated with DOBSON, Peter (Master.)'. At the bottom, there are two document attachments: 'How do I update my language preferences.docx' and 'Test doc for tasks.docx'. A box labeled 'Select an attachment' has an arrow pointing to the second document.

# Comparing the old to the new


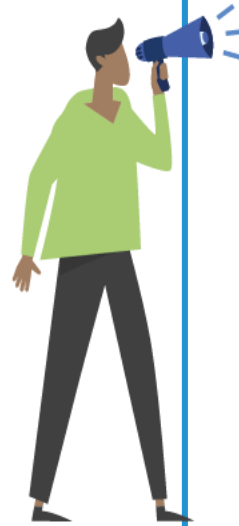
## Creating an Announcement

### Daybook

- Select **Announcement** from the toolbar:

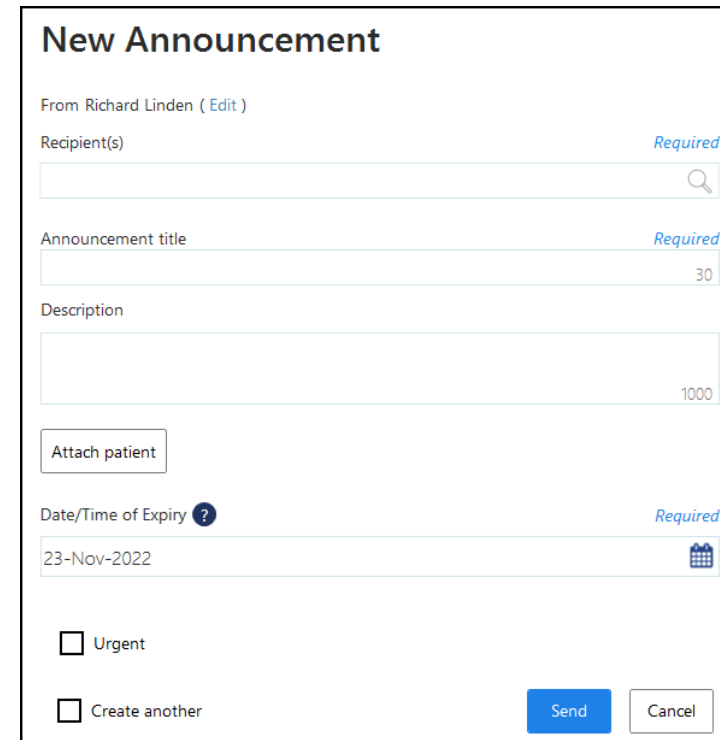


- Complete as required:

A screenshot of a dialog box titled 'Sending new announcement'. It contains a 'Description' field, checkboxes for 'Attached to patient' and 'Attached to document', and date pickers for 'Effective from' (28/11/2017) and 'Expires' (28/11/2017). There is a 'To:' field with a 'Choose...' button and a 'Comments:' text area. 'OK' and 'Cancel' buttons are at the bottom.

### Tasks

- From the **Announcement** screen, select **New announcement** and complete as required:

A screenshot of a 'New Announcement' form. It includes fields for 'From Richard Linden ( Edit )', 'Recipient(s)' (Required), 'Announcement title' (Required, 30 characters), and 'Description' (1000 characters). There is an 'Attach patient' button, a 'Date/Time of Expiry' field (Required, 23-Nov-2022), and checkboxes for 'Urgent' and 'Create another'. 'Send' and 'Cancel' buttons are at the bottom right.

# Comparing the old to the new Notification of Announcement

## Daybook

- Relies on you spotting new announcements within the **Announcements** pane of the **Vision 3** front screen or by opening **Daybook** itself.

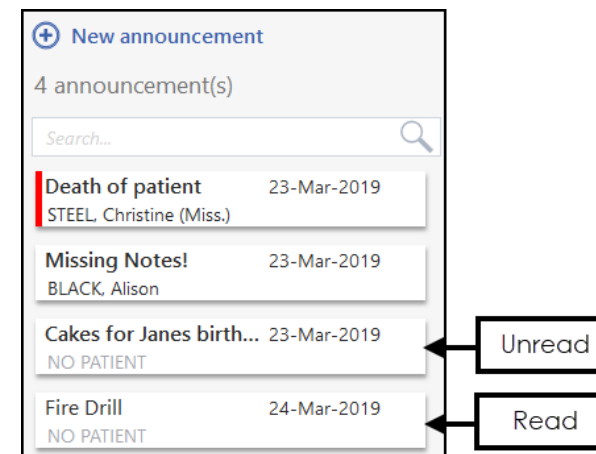


## Tasks

- When a new announcement is received the announcement count on your **Task** screen increases. If there are any unread announcements the count badge displays in red:



- An unread announcement has its title in bold. Once viewed, its title automatically reverts to normal text:



# Comparing the old to the new

## Adding an Out of Office Notification

### Daybook

- Select **Maintenance – Out of Office**
- Select **Add** and complete:

A screenshot of a dialog box titled "Out-of-office entry...". It contains fields for "First Date Out of Office" (10 April 2017) and "Last Date Out of Office" (10 April 2017). There is a "Reason" field with "Annual leave" entered. A checkbox for "Open-ended" is present. Below, there is a field for "During this time period, Tasks assigned to me are also assigned to:" with "Mel Earth; |" entered and a "Choose..." button. "OK" and "Cancel" buttons are at the bottom.

- When you select a recipient with an out of office set:

A screenshot of a recipient selection dialog box. The "To:" field contains "sys;". Below it, a list of recipients is shown, with "System Supervisor (Out of office)" selected and highlighted.

### Tasks

- Select **Settings**  and then **Out of office**, complete the details required:

A screenshot of a settings form for "Out of office". It has a section "Select the staff member who will be out-of-office" with a dropdown menu showing "Richard Linden". Below is "Select the out-of-office dates" with "From" (28/11/2022) and "To" (02/12/2022) fields, each with a calendar icon and a "Clear dates" link. The final section is "Select a deputy to receive tasks while the selected staff member is out-of-office" with an "Assign deputy" field showing "Alison Rowan" and a search icon.

- When you select a recipient with an out of office set:

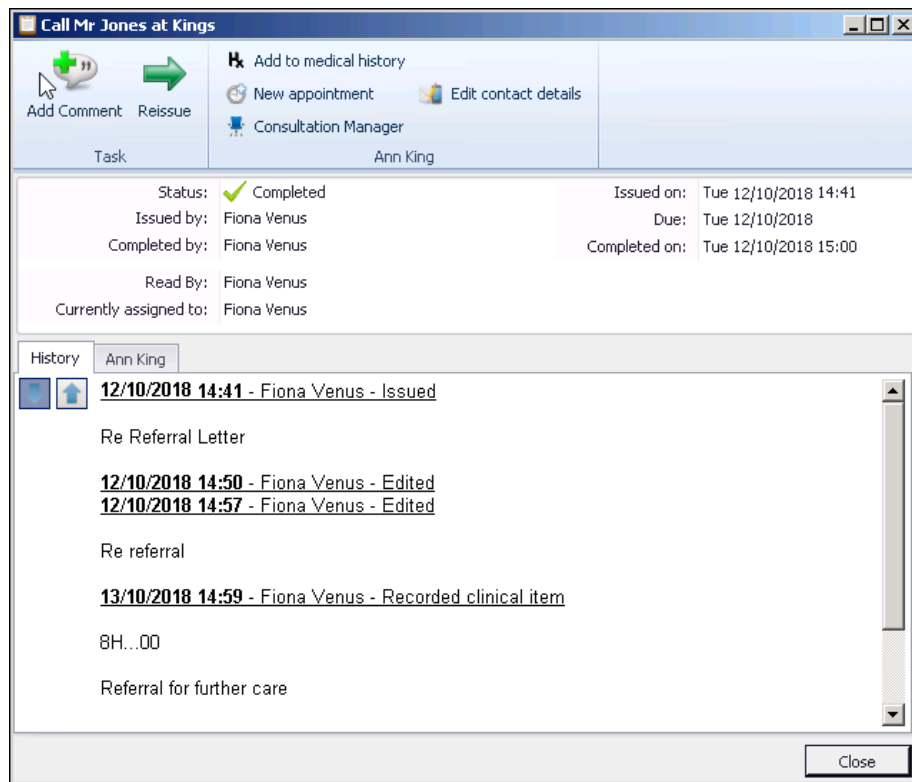
A screenshot of a recipient selection form. The "Recipient(s)" field contains "Ric". Below it, a list of recipients is shown, with "Richard Linden" selected and highlighted. A red "X" icon is next to the name. To the right of the name, it says "Out of office between 30/09/2019 and 04/10/2019".

# Comparing the old to the new

## Audit Trail

### Daybook

- You can look at the audit trail for an individual task only, each task displays full audit trail on it's **History** tab:



Call Mr Jones at Kings

Task: Ann King

Status: ✔ Completed  
Issued by: Fiona Venus  
Completed by: Fiona Venus  
Read By: Fiona Venus  
Currently assigned to: Fiona Venus

Issued on: Tue 12/10/2018 14:41  
Due: Tue 12/10/2018  
Completed on: Tue 12/10/2018 15:00

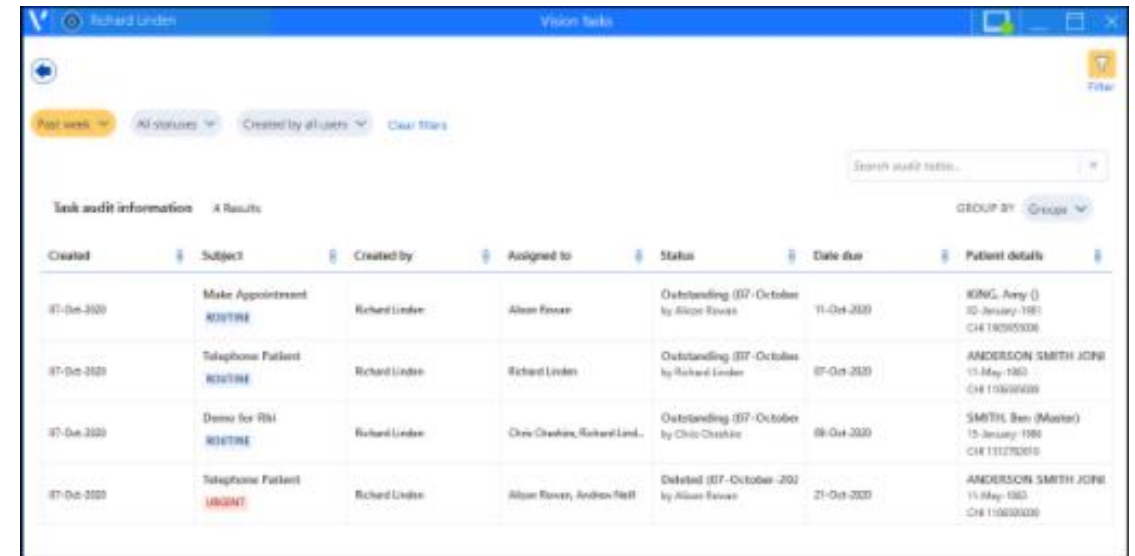
History

- 12/10/2018 14:41 - Fiona Venus - Issued  
Re Referral Letter
- 12/10/2018 14:50 - Fiona Venus - Edited
- 12/10/2018 14:57 - Fiona Venus - Edited  
Re referral
- 13/10/2018 14:59 - Fiona Venus - Recorded clinical item  
BH...00
- Referral for further care

Close

### Tasks

- The **Task Audit** utility allows you to interrogate all tasks for auditing purposes:



Task audit information

Created	Subject	Created by	Assigned to	Status	Date due	Patient details
07-Oct-2020	Make Appointment <span style="color: blue;">RESTATE</span>	Richard Linden	Alice Rowan	Outstanding (07-October by Alice Rowan	11-Oct-2020	KING, Amy () 10-Jan-1981 C# 110205036
07-Oct-2020	Telephone Patient <span style="color: blue;">RESTATE</span>	Richard Linden	Richard Linden	Outstanding (07-October by Richard Linden	07-Oct-2020	ANDERSON SMITH, JANE 15-May-1962 C# 110205036
07-Oct-2020	Demo for RMI <span style="color: blue;">RESTATE</span>	Richard Linden	Chris Christie, Richard Lind...	Outstanding (07-October by Chris Christie	08-Oct-2020	SMITH, Ben (Master) 15-Jan-1981 C# 111292016
07-Oct-2020	Telephone Patient <span style="color: red;">URGENT</span>	Richard Linden	Alice Rowan, Andrew Hall	Deleted (07-October-2020 by Alice Rowan	21-Oct-2020	ANDERSON SMITH, JANE 15-May-1962 C# 110205036

# For full details, see the Tasks Help Centre

