

Tasks Desk Aid



Notification - Points to the notification bell icon in the top left corner.

Select to add a task - Points to the 'New task' button in the top navigation bar.

Select to add from a template - Points to the 'Templates' dropdown menu in the top navigation bar.

Navigation Bar - Points to the left-hand navigation pane containing task folders.

Available folders - Points to the folder list on the left. **Note - UNASSIGNED and ALL TASKS are available to System Administrators only**

List of tasks, those displaying depend on the folder selected - Points to the main task list in the center.

Select to view and record any activity for this task - Points to the 'Activity' tab in the task detail view.

Select to start or continue a conversation - Points to the 'Conversation' tab in the task detail view.

Any other tasks for this patient - Points to the summary of other tasks associated with the patient in the task detail view.

Any attachments attached to this task - Points to the 'Attachments' section in the task detail view. **Note - You may have to use the scroll bar to access them**

Patient details if appropriate - Points to the patient information header in the task detail view.

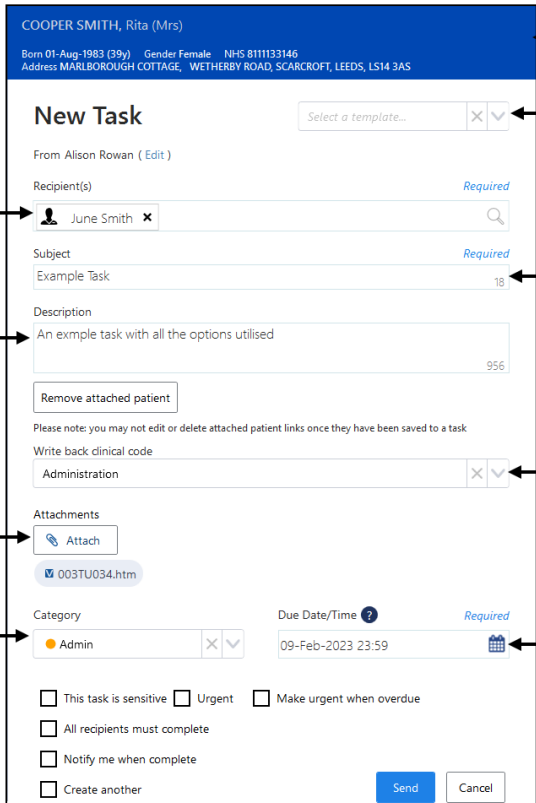
Option menu - Points to the vertical ellipsis menu icon in the task detail view.

Tasks Desk Aid

The following options are commonly used from **Tasks**:

Creating a Task

Select **New task**  and complete the **New Task** screen:



COOPER SMITH, Rita (Mrs)
 Born 01-Aug-1983 (39y) Gender Female NHS 811113146
 Address: MARLBOROUGH COTTAGE, WETHERBY ROAD, SCARCROFT, LEEDS, LS14 3AS

New Task Select a template...

From Alison Rowan (Edit)

Recipient(s) *Required*
 June Smith x

Subject *Required*
 Example Task

Description
 An exmple task with all the options utilised

Remove attached patient

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

Write back clinical code
 Administration

Attachments
 Attach
 003TU034.htm

Category
 Admin

Due Date/Time *Required*
 09-Feb-2023 23:59

This task is sensitive Urgent Make urgent when overdue
 All recipients must complete
 Notify me when complete
 Create another

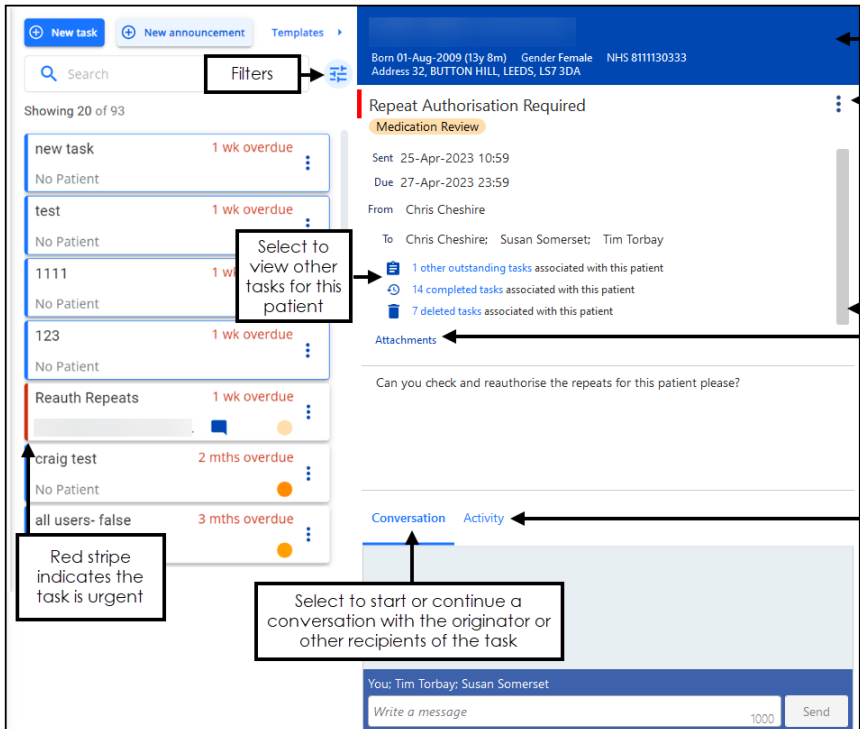
Callouts:

- Select a recipient or a group of recipients
- Enter the action required
- Optional - Select to add attachment(s)
- Optional - Select a category
- Patient details display if attached to a patient
- Optional - Select to use a Task Template
- Enter a name for this task
- Optional - Select a clinical term to write back to the patient record
- Select a due date or enter an offset

Processing a Task

Select a task from your task list and the details display to the right of your list. From

Options  select an action:



new task 1 wk overdue
 No Patient

test 1 wk overdue
 No Patient

1111 1 wk overdue
 No Patient

123 1 wk overdue
 No Patient

Reauth Repeats 1 wk overdue

craig test 2 mths overdue
 No Patient

all users- false 3 mths overdue

Repeat Authorisation Required
 Medication Review
 Sent 25-Apr-2023 10:59
 Due 27-Apr-2023 23:59
 From Chris Cheshire
 To Chris Cheshire; Susan Somerset; Tim Torbay
 1 other outstanding tasks associated with this patient
 14 completed tasks associated with this patient
 7 deleted tasks associated with this patient

Attachments

Can you check and reauthorise the repeats for this patient please?

Conversation Activity

You: Tim Torbay; Susan Somerset
 Write a message 1000 Send

Callouts:

- Filters
- Select to view other tasks for this patient
- Red stripe indicates the task is urgent
- Select to start or continue a conversation with the originator or other recipients of the task
- Select to Edit, Accept, Reject, Delete, Complete or Reissue this task
- Use the slide bar to access and view any attachments
- Select to view and record any activity for this task
- Patient details if attached to a patient

Creating an Announcement

Select **New announcement**  and complete the **New announcement** form.

 **Remember - Announcements** do not need actioning, they are for information only.