

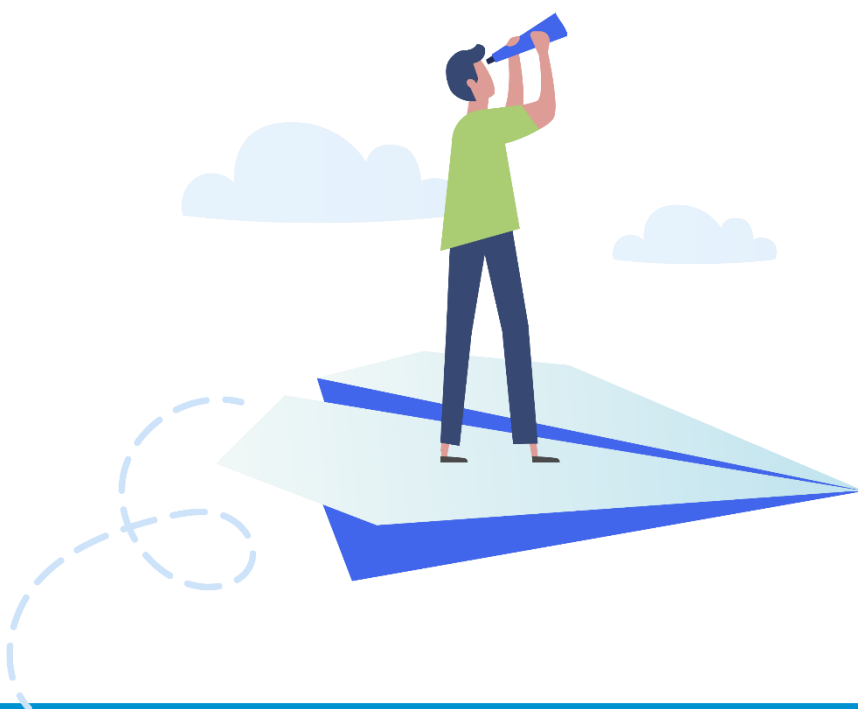


Tasks

Tasks Frequently Asked Questions

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What are the advantages of Tasks?

What can I use Tasks for?

Common uses of **Tasks** include:

- **Simple messages** - Practice and personal, for example, "Please call Mrs Jones re her mother", "There is a parcel in reception for you".
- **Self-Reminders** - For example, "Remember to write a referral letter to Mr Smith at Kings re Mrs Jones".
- **Allocating, tracking and recording home visits** - For example, sending a request to all on call GP's - "Visit Mr Smith", anyone of them can accept, action and then complete the task and you are notified when it is done.
- **Repeat medication authorisation requests** - A quick template message to a responsible clinician to reauthorise medication already linked to the correct patient.
- **Stock requests** - Sent from the treatment room to whoever orders supplies.
- **Staff notices** - Meeting notifications, staff notices and social notices.
- **Cross-organisation communication** - Communicating in a secure way across different organisations with a full audit trail.

Can I see what has happened to a task?

Yes, **Tasks** contains a full audit trail on every task created.

Navigating Tasks

How do I Navigate around Tasks

When you open **Tasks** the **My tasks** screen initially displays, listing all outstanding tasks allocated to you.

Select from the following screens for other information:

- **Completed** - To view all of your completed tasks.
- **Sent tasks** - To view tasks you have created and sent:
 - **Outbox** - If **Tasks** services go down, any tasks you send are held here. These are automatically sent when services resume.
 - **Completed** - Displays all tasks you have sent that have been completed.
 - **Rejected** - Displays tasks you have sent that have been rejected by the recipient.
 - **Deleted** - Displays any tasks you have sent that have been deleted by the recipient.
- **Unassigned** (System Managers only) - To view tasks from other organisations and allocate them to your staff.
- **All tasks** (System Managers only) - To view all outstanding tasks for your practice.
- **Announcements** - To create internal announcements and to view those sent to you:
 - **Outbox** - To view announcements you have created if **Tasks** services go down. Any announcements you send are held here until the services resume and the announcements are automatically sent.
 - **Sent** - To view announcements you have sent.

What do the various buttons and symbols mean?

The following options are available within **Tasks**:



Conversation bubble - Indicates a conversation on a task.



External Group - Indicates this task is either going to or coming from a third party organisation.



Task Locked - Indicates you are working on this task, it is therefore locked.



Task Locked - Indicates someone is working on this task, it is therefore locked.



Attachment - Indicates there is an attachment on a task.



Options - Indicates additional options are available, select to view the options from this screen.



Filter - Select to fine tune the tasks you are viewing. Select to fine tune your view.



Filtered - Indicates you are seeing a filtered list. Select to clear or change your view.



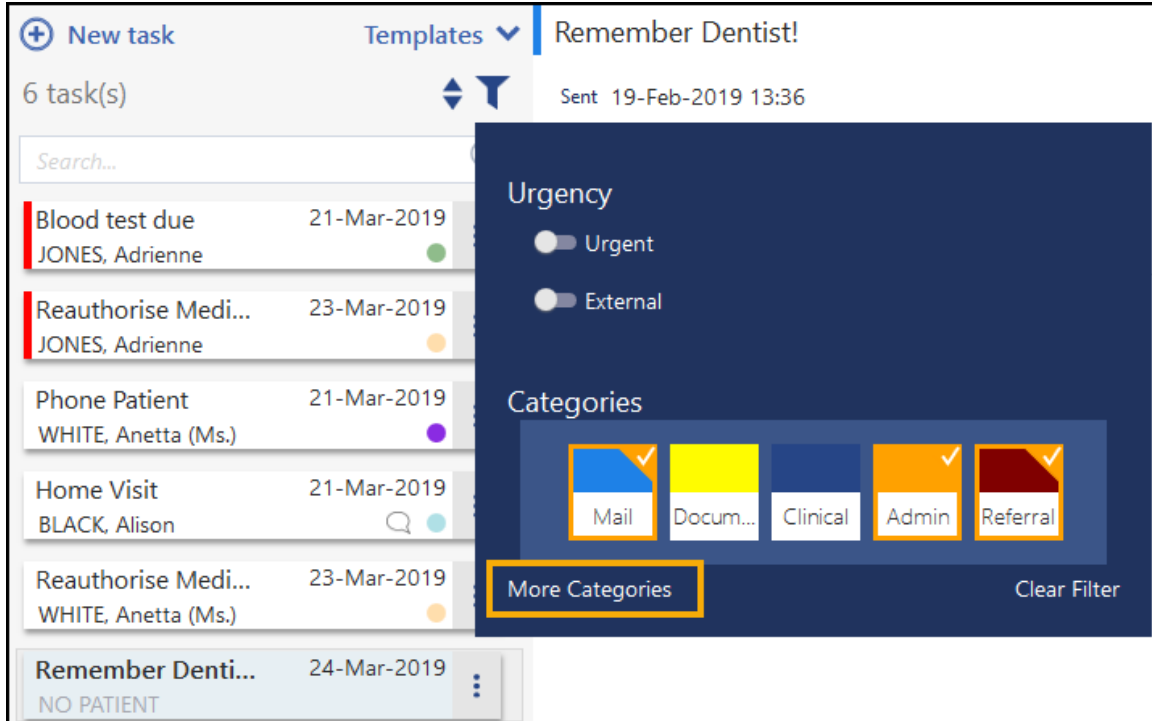
Reorder - Select to define the order of the tasks you are viewing.



Reordered - Indicates the list order has been changed. Select to clear or change your view.



How do I filter my tasks?


You can filter your tasks list by selecting **Filter**  and selecting the **Urgency** and **Categories** you require, select **More Categories** to see the full list:



When active, the **Filter** displays in orange . Select **Clear Filter**, to revert to your full list.

How do I change the order my Tasks display?

You can change the order your tasks display by selecting **Reorder**  and selecting from the list available. When active **Reorder** displays in orange .


 **Note** - There is currently no option for reverting to the default list order. To clear a selected order, select a different view, for example **Announcements**, and then reselect **My tasks**.

How do I close a task?

The only way to close/release a task is to select another task or close **Tasks** itself. If you leave **Tasks** open for more than 15 minutes with no action, for security reasons you are automatically logged out and you need to enter your password again.

Adding Tasks

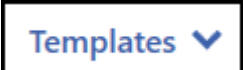
How do I add a Task?

Simply select **New Task**  from anywhere within **Tasks**, complete the details as required and select **Send**.

How do I add a Task from a Template?

Simply select **Templates**  and select from the list offered, complete the details as required and select **Send**.

What Templates am I offered in my list?

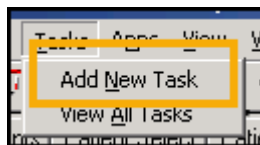
When you select **Templates** , a list of templates displays to select from. Depending on how your system is set up, and which staff groups you are a member of, you are offered either a short list of your most frequently used tasks or a longer list with your most frequently used at the top.

How do I add a task from Consultation Manager


To add a task from **Consultation Manager**:




1. From **Consultation Manager**, select the patient in the usual way.
2. Select **Tasks - Add New Task**:



3. **Tasks** automatically opens, the **New Task** screen displays and the selected patient is attached. If you want to select a task template, you

need to close the **New Task** screen, select **Templates**  and then select the appropriate template.

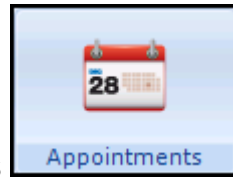
4. Complete the task details as required.
5. Select **Send**.
6. Select **Close**  in the top right corner to return to **Consultation Manager**.



How do I add a task from a reminder?

You can add a task from a reminder in both **Consultation Manager**




and **Appointments**

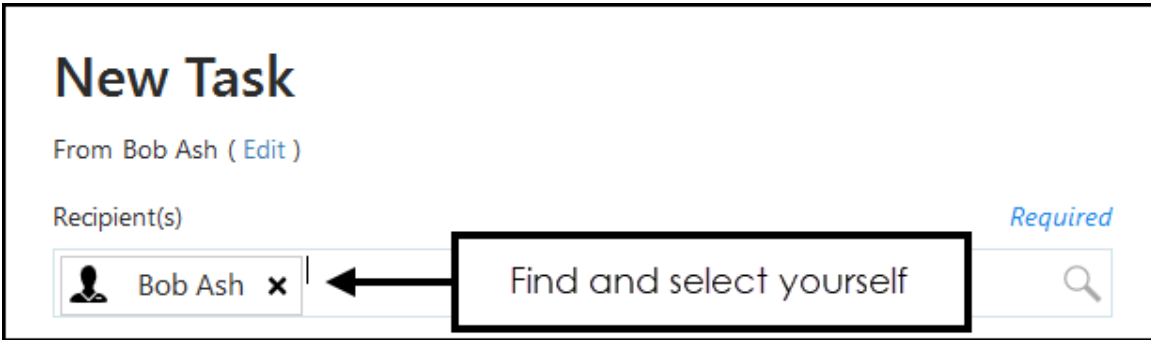


1. Simply right click on the reminder and select **Add task**.
2. **Tasks** automatically opens, the **New Task** screen displays and the selected patient is attached. If you want to select a task template, you need to close the **New Task** screen, select **Templates**  and then select the appropriate template.
3. Complete the task details as required
4. Select **Send**.
5. Select **Close**  in the top right corner to return to **Vision 3**.


How do I add a self-assigned Task?

A self-assigned task is a task that you create to remind yourself of something, for example, an appointment or a letter to write.

Simply select **New Task**  from anywhere within **Tasks** and select yourself in **Recipient(s)**:

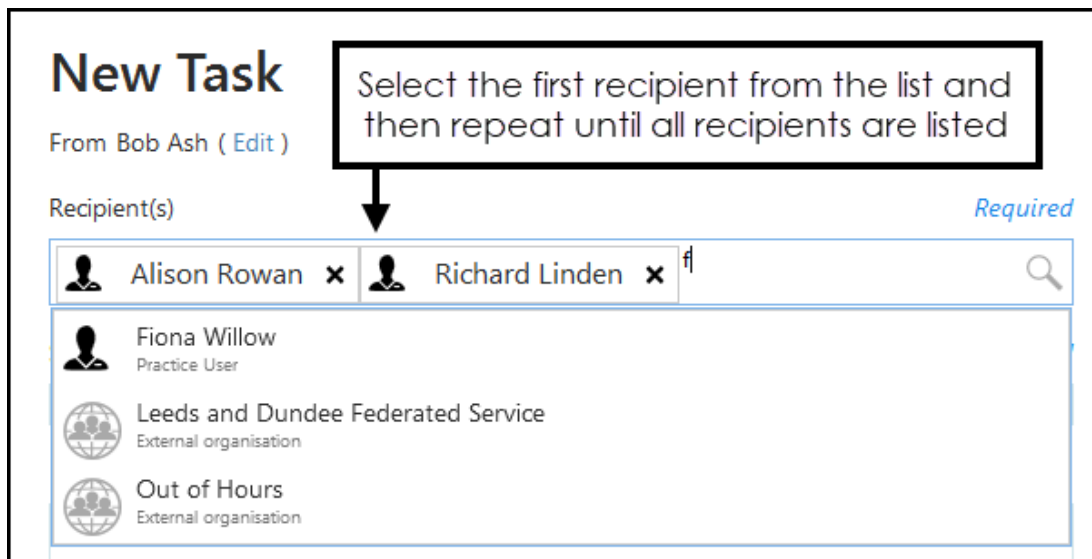


Now, complete the task in the usual way.

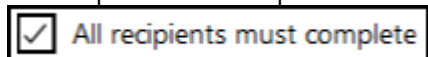
 **Note** - All tasks can be viewed by System Managers, this includes self assigned tasks.

How do I send a task to more than one recipient?

To send a task to more than one recipient, simply select the first recipient in **To** and then repeat until all the recipients are listed:



To request all recipients action a task, tick **All recipients must complete**




How do I add an attachment?

To add an attachment to a task, select **Attach**  and select the file required.

How do I add a task for someone in a different practice?

You can send a task for a person in another practice, providing you have a sharing agreement in place, by simply ensuring:

- Their organisation is selected in **Recipient**. External organisations are

denoted by the External group symbol  and a footer of **External organisation**:

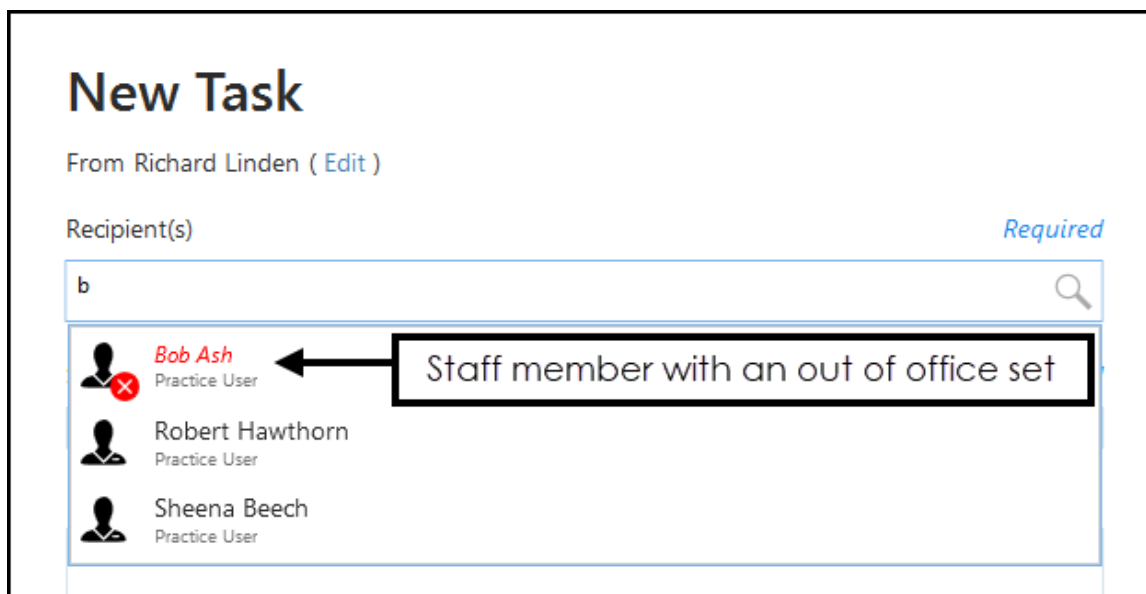


- If the task is for a specific person, they should be named in the **Subject**.
- A **Category** is selected.



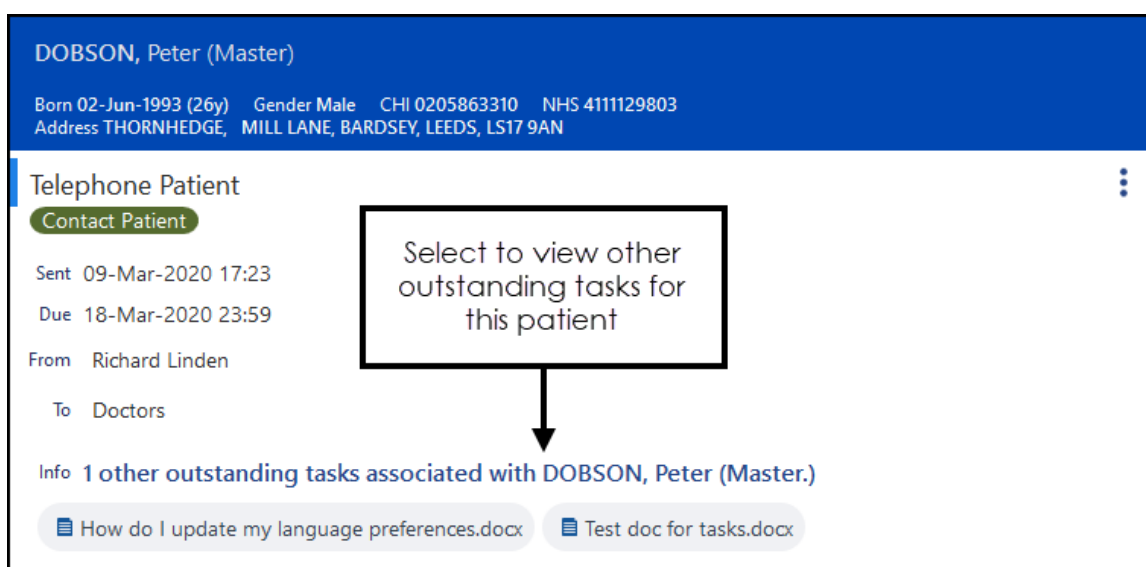
How do I know if someone is away?

When you select a recipient for a task, if they have an out of office set up, their name displays in **red** and their nominated recipient listed in brackets. If you select a staff group where a member of the group has an out of office set up, the number of staff with an out of office displays in brackets:



How do I see what other Tasks are linked to a particular patient?

After selecting a task, if there are other outstanding tasks for the same patient, '*n other outstanding tasks associated with*' displays where '*n*' is the number of tasks. Select to list the other tasks:



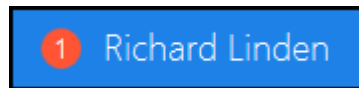
Why should I mark a Task as Sensitive?

The ability to mark a task as sensitive enables you to create a task that exists for, but cannot be read by, inappropriate members of staff. For example, a patient calls the practice and says someone tried to call them from the practice earlier, the recipient of the call can see that the task exists and who it is assigned to and so route the call accordingly.

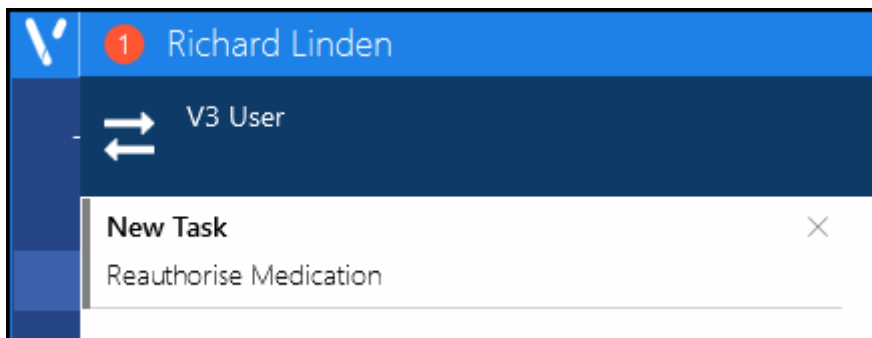
Processing Tasks


How do I know I have received a Tasks or message?

Notification alerts display on your user profile



Select your user profile to display your notifications:



Select the notification to open the task, or select **Close**  to clear the notification without opening it.

If **Tasks** is open but minimised or, hidden behind another screen, when you receive a new task or announcement, a red disk displays on **Tasks** on your

task bar .

Or

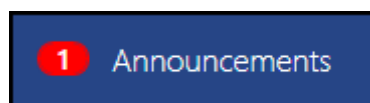
From the **Vision 3** front screen, any new tasks and announcements display in the **Tasks** pane.

What type of Notifications might I receive?

The following notifications are flagged next to your name:

- **New Task** - Received when a task is allocated to you.
- **New Comment** - Received when a recipient adds to the conversation on a task you are included on.
- **New Announcements** - Received when you are included in an announcement.

When you receive a new item the count number increases and in the case of **Rejected**, **Unassigned** and **Announcements** the counter turns red:




Is there a quick way to view contact information for a patient?

To view the contact information of a patient attached to a task, simply select the patient name and their demographics display.

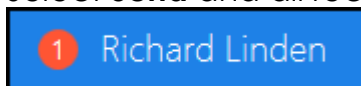
How do I send an internal message about a Task?

To start, or add to, a conversation:

1. Select the required task.
2. Select the **Conversation** tab  and any existing messages display.
3. Type in your message, up to 1000 characters:



4. Select **Send** and all recipients are notified via their user profile




that something is pending.

Where are the available processing options on a Task?

Select the **Options menu**  to access the processing options from any specific task.

How do I forward a task?

To forward a task to a new recipient, simply select **Edit** from the **Options menu** , add them to the **Recipient** list and select **Update**.

How do I find a task?

Enter any of the following into **Search**

- Patient name (surname first)
- Subject
- Sender
- Part of the description

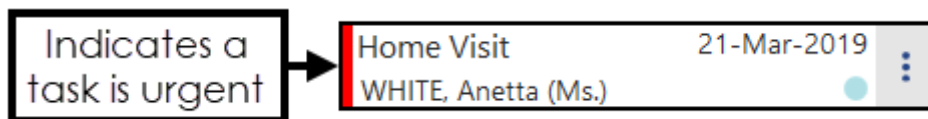
As you type the smart search automatically displays matching tasks under the search.

What happens to my tasks when I am away?

If you are due to be away, you can set an **Out of Office** to forward your tasks while you are away.

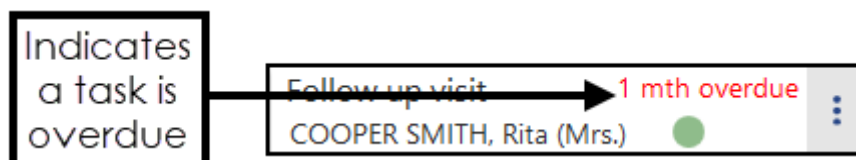
What does the red line mean?

The red stripe in front of a task indicates that the task is urgent:



Why is there a date in red


When a task falls overdue the date displays in red:



Announcements

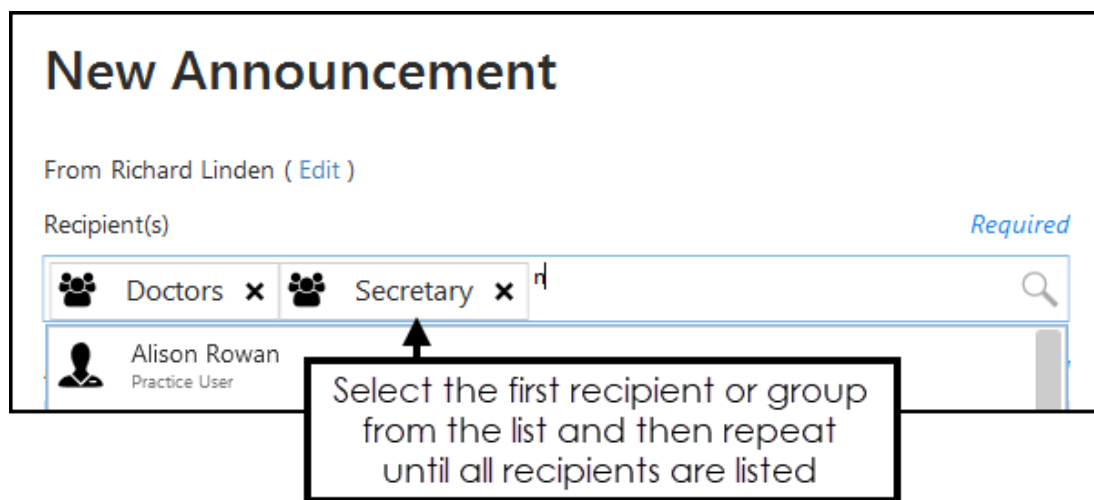
How do I add an Announcement?

Simply select **Announcements** from your list of available screens and select

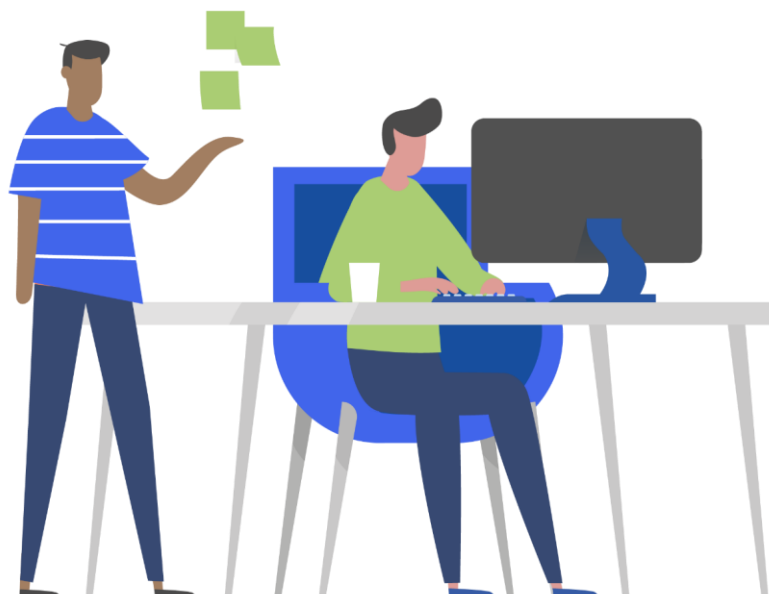
New announcement , complete the details as required and select **Send**.

How do I send an Announcement to multiple recipients?

To send an Announcement to multiple recipients, simply select the first recipient or group in **Recipient(s)** and then repeat until all the recipients are listed:

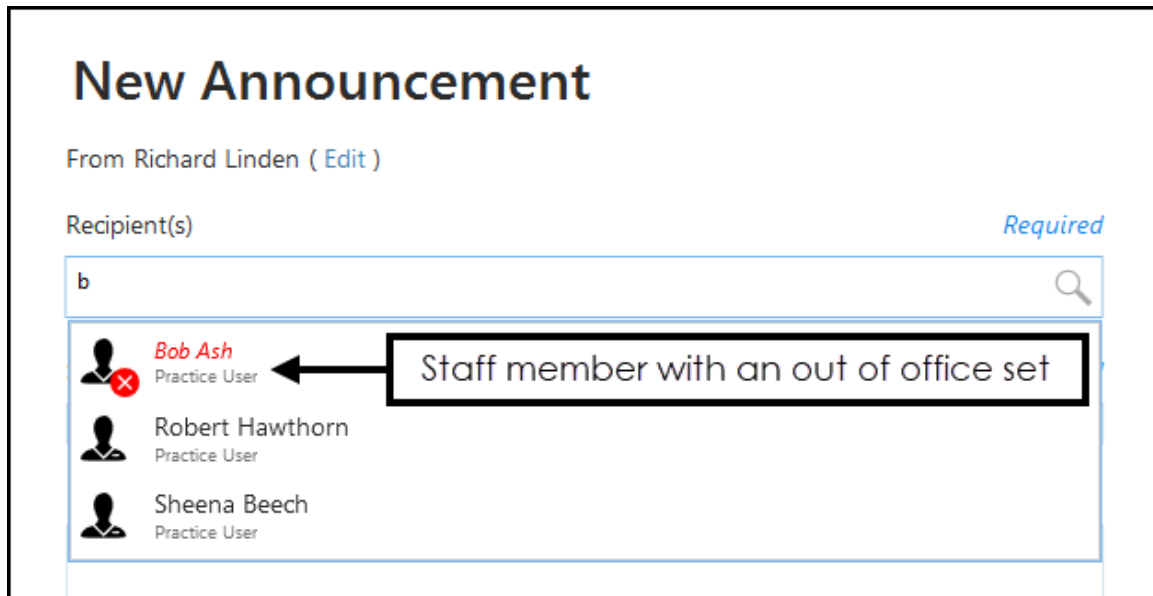


To send an announcement to all staff, select **ALL USERS**.



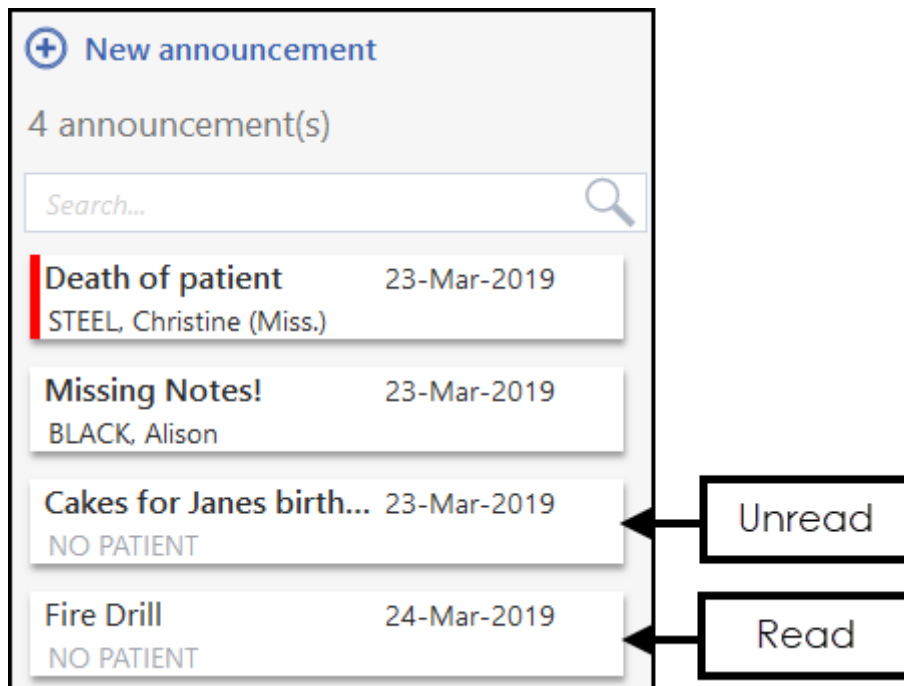
How do I know if someone is away?

When you select a recipient for an announcement, if they have an out of office set up, their name displays in **red** and the dates of their absence displays alongside. If you select a staff group where a member of the group has an out of office set up, the number of staff with an out of office displays in brackets.



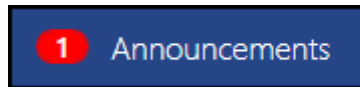
How do I know if I have viewed an Announcement?

An unread announcement displays with its title in bold. Once it has been viewed its title automatically reverts to normal text:



How do I know if there are any new Announcements?

From your **Tasks** screen, the number next to **Announcements** increases and displays with a red background:



If **Tasks** is open but minimised or, hidden behind another screen, when you receive a new announcement or task, a red disk displays on **Tasks** on your

task bar .

How do I cancel an Announcement

You can only recall an announcement if you were the one that created it.

From your **Announcement - Sent** screen, select **Options**  and select **Recall**.



Keyboard Shortcuts

Within **Tasks** the following keyboard shortcuts are available:

With a Task Selected	
Complete	Ctrl + Shift + C
Delete	Ctrl + Shift + D
Edit	Ctrl + Shift + E
Reject	Ctrl + Shift + R

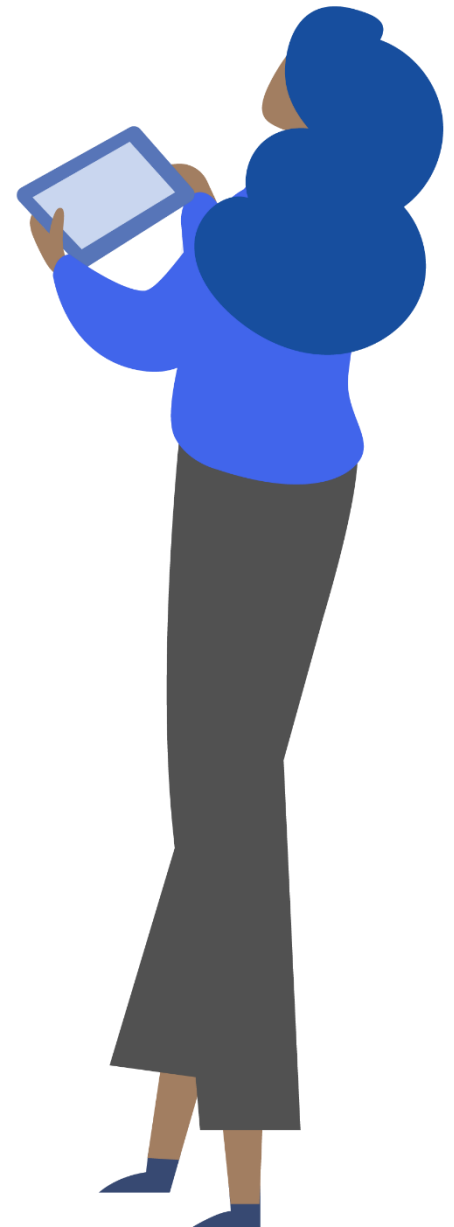
With an unassigned Cross Org Task Selected	
Forward	Ctrl + Shift + F

When in any of the Tasks Folders	
Task	Ctrl + Shift + N

When in any of the Announcements Folders	
Announcement	Ctrl + Shift + N

With an Announcement Selected that can be recalled	
Announcement	Ctrl + Shift + R

When on the Main Tasks View	
Go to Settings	Ctrl + Shift + S
Go to Templates	Ctrl + Shift + T
Go to Out of Office	Ctrl + Shift + O



Troubleshooting

How do I find an old Daybook task or announcement?

All your outstanding tasks migrate to **Tasks** from **Daybook** and can therefore be found via one or more of the available **Tasks** screens. However, post migration, any tasks previously completed in **Daybook** are stored in a database that can only be accessed by the **Cegedim Healthcare Solutions Helpdesk**. Should you need access to any of your old **Daybook** tasks contact the Helpdesk and they can retrieve the information for you. This also applies to any announcements recorded in **Daybook**.

How do I see a Task in Consultation Manager?



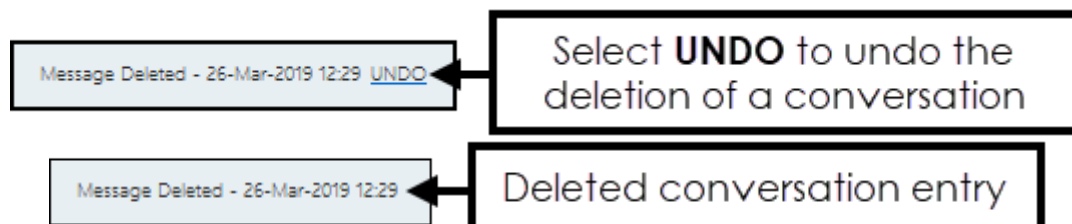
To view any tasks for a patient from **Consultation Manager** simply select **Tasks - View All Tasks** and **Tasks** displays with the selected patient's tasks shown.

How do I delete a conversation item?

If you have added a comment in error, simply select the **X** to delete it:



Once an item is deleted, you can undo the delete by selecting **Undo**. This is available until you deselect the task.



Where is the full audit trail?

- **Standard Tasks User** - As a normal **Tasks** user, as well as displaying any activity your practice have added manually, the **Activity** tab of a task contains a full audit trail of a task:

Conversation		Activity
26-Mar-2019 13:01:52	Task was created.	Richard Linden
26-Mar-2019 13:03:33	Description edited	Richard Linden
26-Mar-2019 13:03:56	Task was completed	Bob Ash

Write update... 100 Update

- **System Administrator** - Select **Settings**  - **Tasks Audit** to view the audit trail of any task.

What do I do if I accidentally complete a task?

If a task is completed in error, it must be recreated.

How do I see the initial Getting Started screens again?


To see the screens that displayed on your initial log in:

1. Simply right click **Help**  and select **Getting Started**.
2. Use the arrow buttons  to move through the various screens.


Can I still work if the Tasks Services are down?

Should the **Tasks** services go down, any tasks or announcements you create are stored in the relevant **Outbox**. Once the **Tasks** services are resumed, anything in your **Outbox** is automatically sent. You cannot edit, complete, start or add to a conversation or add to the **Activity** of a task until services are reinstated.

How do I cancel an Announcement

Providing you are the one that created the announcement, you can recall it from the **Announcement - Sent** screen, select **Options**  and select **Recall**.

The traffic light is red at the top of the screen, what does this mean?

At the top right of the **Tasks** screen is an indicator of **Tasks** services, if the indicator is red  it means your **Tasks** services are down.

I can't log on to Tasks

Because **Tasks** uses **Vision360** services to talk to **Vision 3**, if your user account is locked in **Vision360**, you cannot access **Tasks**.

 See [3 Quick Steps to Unlocking a User Account](#) in the **Shared Care Help Centre** for details on how to resolve this issue.

