Tasks

Getting Ready for Tasks – Migrating from Daybook

Version 1.7

9th February 2023

cegedim Healthcare Solutions

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Introduction

Our new **Tasks** app provides an easy to use task management system for your practice. The first release of **Tasks** is specifically designed to help create, keep track of and process tasks and to-do lists quickly and easily.

We are proud of **Tasks** and are currently working to bring you even more new features. Future releases will bring all of your clinical messages into **Tasks**, providing a single app to manage all the tasks your practice needs to process on a day by day basis.

What do I need to do?

The following should be considered **before** you migrate to **Tasks**:

- **It is vital you review all your outstanding tasks in Daybook** - Complete as many of your outstanding tasks as possible, especially your system generated ones, to ensure only those tasks that require actioning are migrated.
- **Training** - Complete the eLearning and/or use this help centre to find out all you need to know about migrating to and using **Tasks**.
- **Check security rights** - By default all staff have access to **Tasks**, however, only staff with system manager rights in **Vision 3** can:
    - Create and maintain templates.
    - View **All tasks** including sensitive tasks.
    - Allocate tasks received from other organisations.

  See **Security - Add User to Security Group** for instructions on how to manage **Vision 3** security rights.
- **Set up Set up Role Based Access Cards (RBAC) (England only)** - If you were already using **Daybook**, you should already have the required RBAC activity **B0093 Create Work Item** on your Smartcard. You need to ensure all staff that may need to use **Tasks** have this activity on their Smartcards, please contact the relevant person at your Registration Authority (RA) who can help with this.
- **Review staff email addresses** - Review, and where necessary add, valid email addresses for your staff in **Vision 3** to enable them to log in to Tasks. See **Managing Staff Email Addresses** on page **8** for details.
- **Review existing Staff Groups** - Review, update and, where necessary, create **Staff Groups** to enable the most effective allocation of Tasks and the set-up of **Template quick lists**. See **Managing Staff Groups** on page **11** for details.

- **Review Task Templates** - Any task templates you have created in Daybook are migrated into **Tasks**. You can review, update, delete and if necessary add to your task templates before you migrate to **Tasks** to ensure the templates migrated are accurate and appropriate. Click here for instructions on how to manage your Task templates in Daybook.
- **Review outstanding Announcements** - As announcements are not migrated to **Tasks**, any future announcements set up in **Daybook** need to be noted and then added to **Tasks** once migration has taken place.

Training

We are providing the following resources to ensure you can get the best out of our new **Tasks** app.

eLearning

While **Tasks** is intuitive and easy to use, for you to get the most out of the experience, we recommend that you spend a little time going through the **Tasks** eLearning modules. This short interactive course walks you through the different screens and how to undertake your day to day tasks. You'll even get a certificate at the end!

Benefits of eLearning include:

- Free training saving your practice £££s
- You can learn at your own pace
- Training can be taken anytime and anywhere - even at home!
- Less disruption - no travelling, significantly less time taken from important practice work

Click here to enter the Learning Zone

Tasks Help Centre

We have also created a full **Tasks Help Centre** to assist you in utilising **Tasks** in the best way for your practice and staff. This contains short video tutorials, a frequently asked questions section, a quick and powerful search facility as well as quick start screens. The **Tasks Help Centre** is available from https://help.cegedim-healthcare.co.uk/tasks_help_centre/Content/Home.htm.

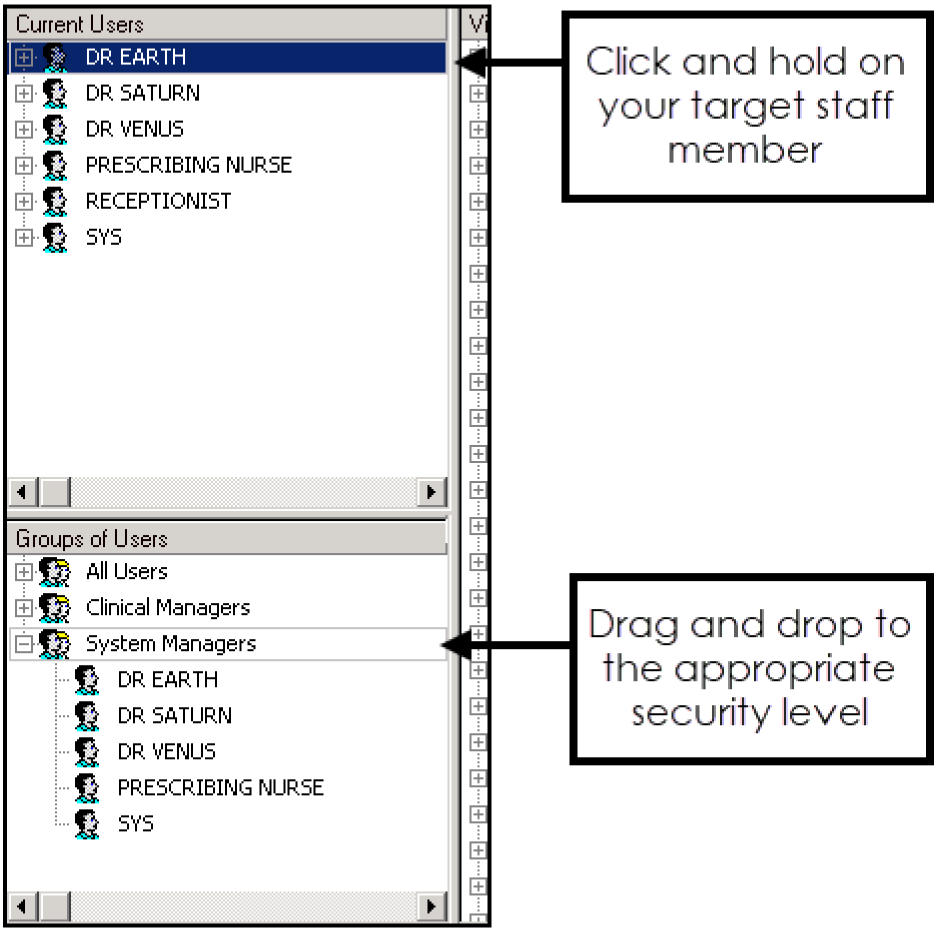
Managing Security Rights

There are certain aspects of **Tasks** that can only be carried out by system managers for example, creating **Templates**.

To add a user to a security group:

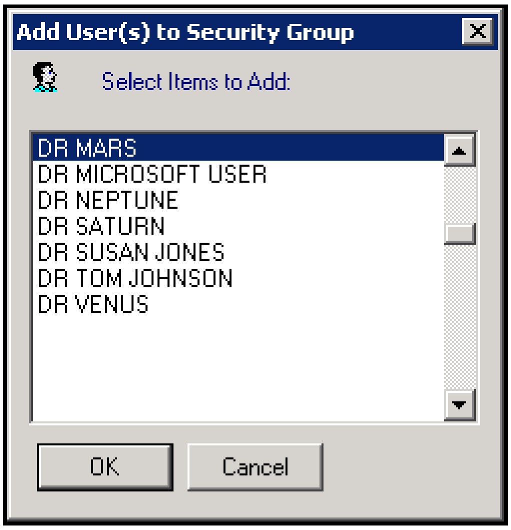
1. From the **Vision 3** front screen, select **Management Tools** - **Control Panel**


- **Security**.
2. Next either:
    - Select the user in the **Current Users** list and holding the left mouse down, drag them to the bottom left pane and drop them in the group you want.



Or

- Highlight one of the group headings in the bottom left pane, for example **Clinical Managers**, or **System Managers**, right click and select **Add User(s) to Group**. Highlight the staff member to be added to the Group and select **OK**.



For full information about **Staff Groups** in **Vision 3**, please see **Vision 3** on-screen Help.

Managing Staff Email Addresses

The recording of main address details for your staff in Vision 3 is optional, however a valid email address must be recorded in order for your staff to access **Tasks**.

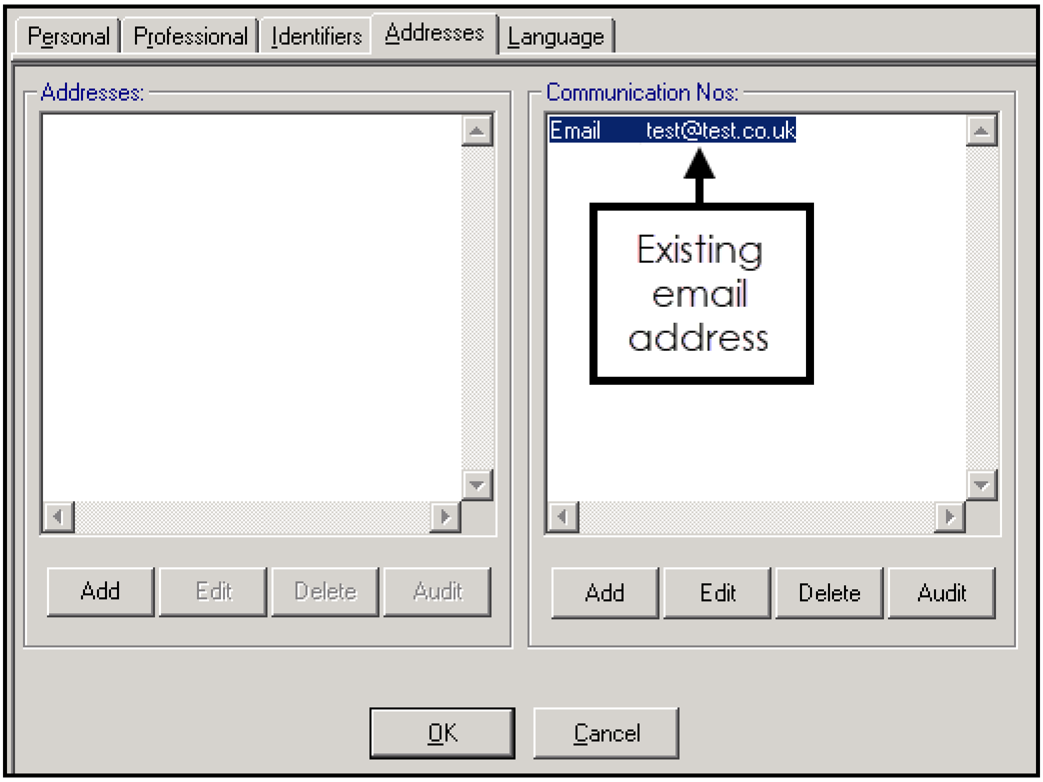
Checking a Staff Email Address

To check an email address:

1. From **Vision 3 - Management Tools - Control Panel** 

, select **File Maintenance - Staff**.
2. Select the member of staff required and select **Edit** 

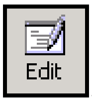
.
3. Select the **Addresses** tab, any recorded email addresses display in the **Communication Nos** pane:



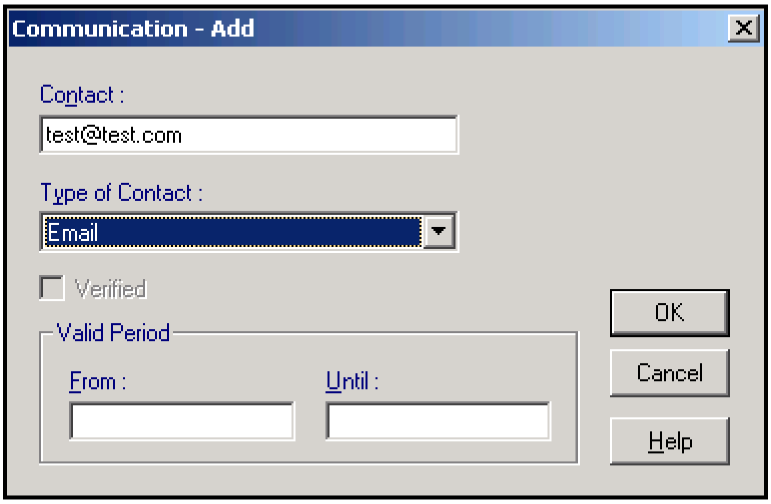
Adding a Staff Email Address

To add an email address:

1. From **Vision 3 - Management Tools - Control Panel** 

, select **File Maintenance - Staff**.
2. Select the member of staff required and select **Edit** 

.
3. Select the **Addresses** tab.
4. From the **Communication Nos** section, select **Add** and the **Communication - Add** screen displays:

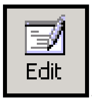


5. Complete as follows:
   - **Contact** - Enter the email address required.
   - **Type of Contact** - Select **Email**.
6. Now select **OK** to save and close.

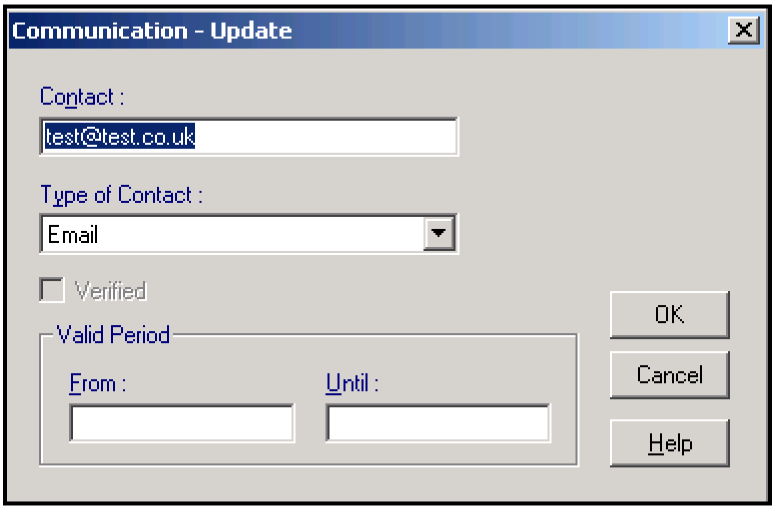
Updating a Staff Email Address

To update an existing email address:

1. From **Vision 3 - Management Tools - Control Panel** 

, select **File Maintenance - Staff**.
2. Select the member of staff required and select **Edit** 

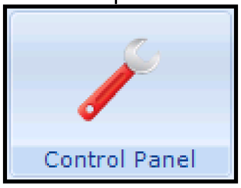
.
3. Select the **Addresses** tab.
4. From the **Communication Nos** section, highlight the email to update and select **Edit**.
5. The **Communication - Update** screen displays:



6. Update the email address as required.
7. Finally, select **OK** to save and close.

Managing Staff Groups

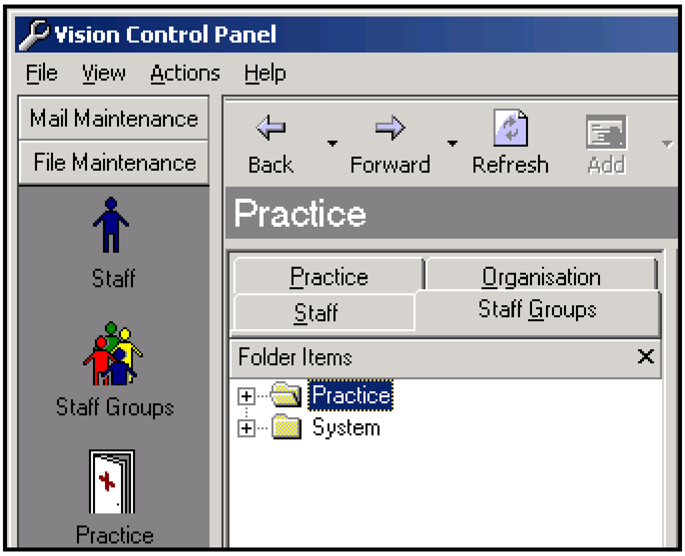
Staff Groups are practice defined groups of staff that are selected from various **Vision 3** modules, for instance, a group of Receptionists, GPs, or Health Visitors.

Staff groups are set up and maintained from **Vision 3 - Management Tools - Control Panel** 

- File Maintenance - Staff Groups.

On selection of the **Staff Groups** tab, two folders display:

- **Practice** - Allows you to create your own defined staff groups, for example Reception Staff, GPs, Admin.
- **System** - **System groups** are used for allocating **Frequent** staff in **Mail Manager** but are not used in **Tasks**:



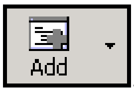
To display all the members of a group:

1. Select **Expand +** beside the **Practice** folder to display existing groups.
2. Select **Expand +** beside either **Mail Groups** or **Frequent Staff**.
3. Now select a group to display all the members of that group.

Creating a New Staff Group

You may decide to create groups specifically for the management of task templates. This can help ensure that the most commonly used task templates are offered to your staff in the most appropriate way. For example, you could set up **Tasks - GPs**, **Tasks- Reception**, **Tasks- Administrators**.

To create a new staff group:

1. From **Vision 3 - Management Tools - Control Panel - File Maintenance - Staff Groups**, simply select the down arrow on **Add** 
.
2. Select **Add Group** and complete **Staff Group - Add** as appropriate.

Adding or Removing Staff from a Group

To add or remove staff to or from a group:

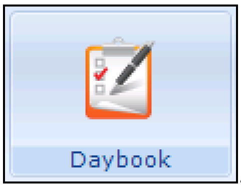
1. From **Vision 3 - Control Panel - File Maintenance - Staff Groups**, select a group name in the left hand pane and the top right pane shows all the active staff in the selected group.
2. The bottom right pane contains a list of **All Staff**, simply drag and drop staff to either add to (drag from bottom to top) or remove from (drag from top to bottom) a group.

Reviewing Task Templates in Daybook

All of your active task templates are migrated from Daybook to **Tasks** as part of the migration process. You should therefore take the time to review and tidy your current templates.

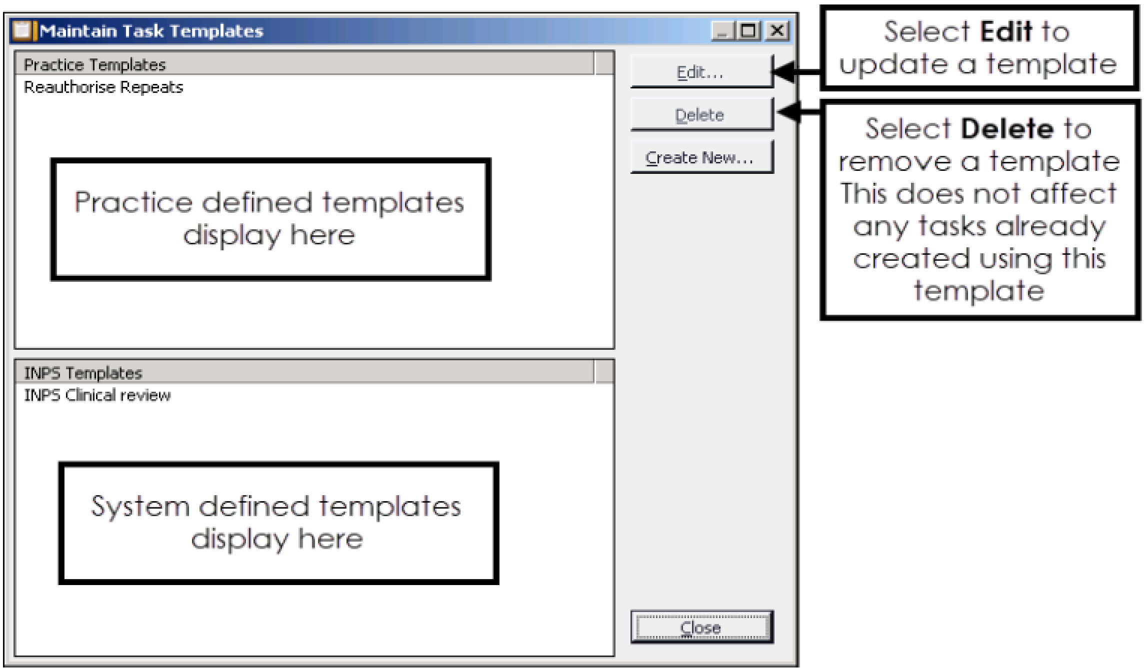
Note - Only a subset of coded **Medical History** entries can be triggered from a task, see **Administrative Codes** on page **14** for the list. If any of your templates have codes other than those on the list, these codes are removed on migration.

To review your templates:

1. From the **Vision 3** front screen, select **Daybook** 

.
2. Select the **Maintenance** tab and then **Task Templates** 

.
3. The **Maintain Task Templates** screen displays:



4. Highlight the task you wish to review and select **Edit**:
    - **Practice Templates** are those created by your practice, these can be updated or removed as you require. **Tasks** already created from these templates are not affected by your actions.
    - **INPS Templates** are those created by **Cegedim Healthcare Solutions**, only certain areas can be updated and they cannot be deleted.
5. Update any details should you require and select **OK**.

Administrative Codes

The following codes can be attached to a task that is linked to a patient and are recorded to the patient record once the task is complete:

- 9....00 Administration
- 8B3H.00 Medication Requested
- 9N31.00 Telephone Encounter
- 67I..00 Advice
- 9p...00 Medication Monitoring Administration
- 8H...00 Referral For Further Care
- 9N7..12 Patient Asked To Come In
- 8B2F.00 Prescription by GP
- 9N7C.00 Patient asked to make an appointment
- 8B31100 Medication Given
- 9N2Y.00 Seen By Community Paediatric Nurse
- ZL63200 Referral To District Nurse
- 9N1C.11 Home Visit
- 9Nc..00 Referral Letter Status
- 9NE1.00 Dictated On Tape:Letter To
- 414..00 Sample Sent To Lab. For Test
- 9N38.00 Message From Patient

- 8B3y.00 Medication Review Of Medical Notes
- 41C..00 Patient Informed - Test Result
- 9D1..00 Med3 - Doctor's Statement
- ZQ3J.00 Triage
- 9N37.00 Message Given To Patient
- 413..00 Laboratory test requested

Managing Existing Announcements

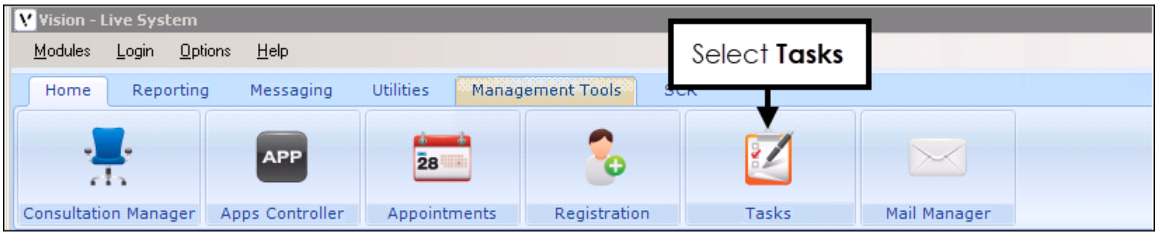
Announcements raised in **Daybook** are not migrated to **Tasks**.

There is no way within **Daybook** to view all outstanding announcements, as they can be raised by any **Daybook** user for the information of any or all other **Daybook** users. The most effective way to manage this aspect of the **Daybook** to **Tasks** transition is to ask all your staff to make a note of their own outstanding announcements, both raised and received.

These can then be manually entered into **Tasks** once the migration has taken place.

When Migration is Complete

Once you have migrated to **Tasks**, **Daybook** on the **Vision 3** front screen updates to **Tasks**:



You should now check your **Tasks Templates** and set the order they display in for each staff group, see **Editing or Deleting Task Templates** on page **16** and **Setting the Display Order of Task Templates** on page **17** for details.

Editing or Deleting Task Templates

To edit or delete templates:

You must have administrator rights to access **Settings - Task Templates**.

1. From **Tasks**, select **Settings** .
2. Now select **Task Templates** Task Templates and all your Task Templates display.
3. Select the template you wish to edit or delete and the **Edit** and **Delete** icons display.
4. Select:
   - **Edit** to update the details of the template. Make the changes required for the template and then select **Update** to save the changes.
   - **Delete** to delete the selected template.

Your changes are now applied.

Setting the Display Order of Task Templates

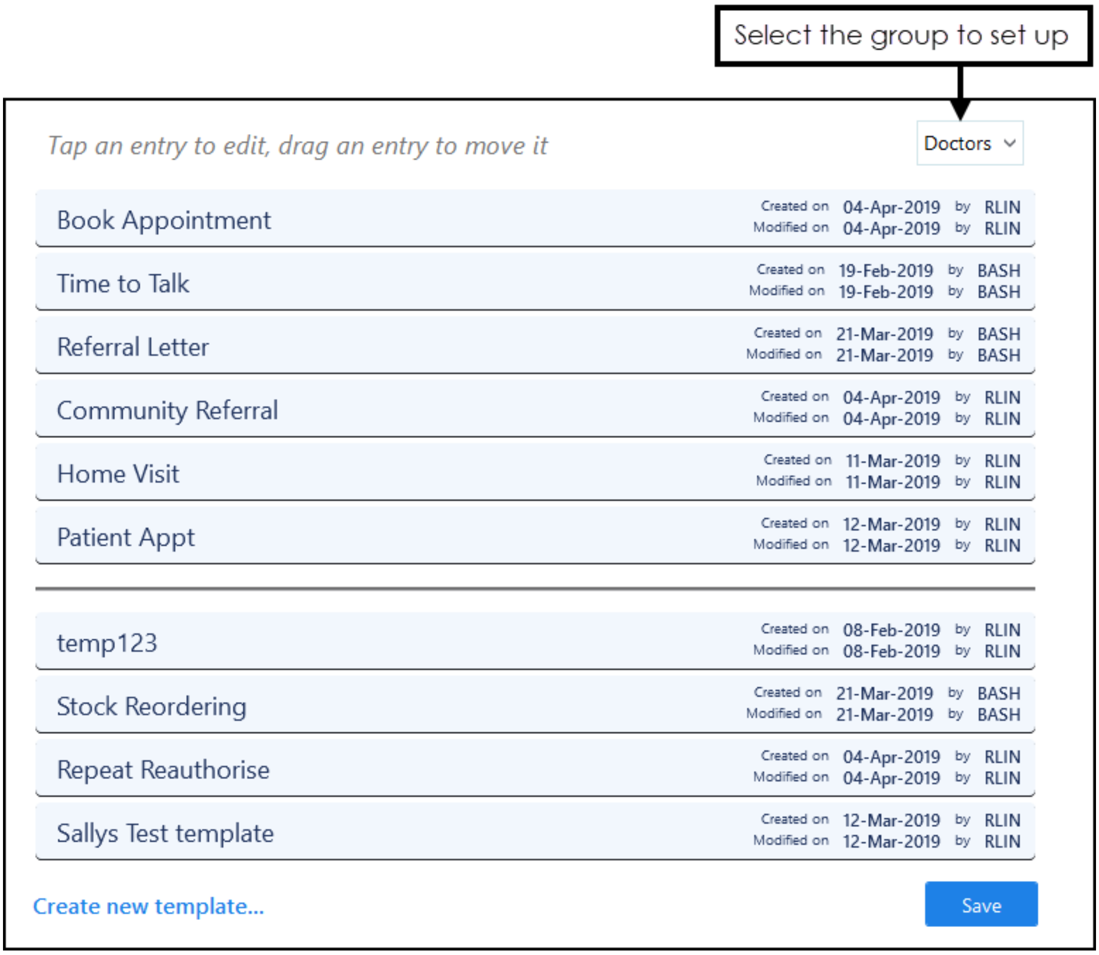
As a system manager you can create a quick list for any staff group to change the order of the **Task Templates** offered. This ensures your staff have quick access to their most commonly used templates, resulting in quick and consistent task creation.

Note - You must have administrator rights to access **Settings - Task Templates**.

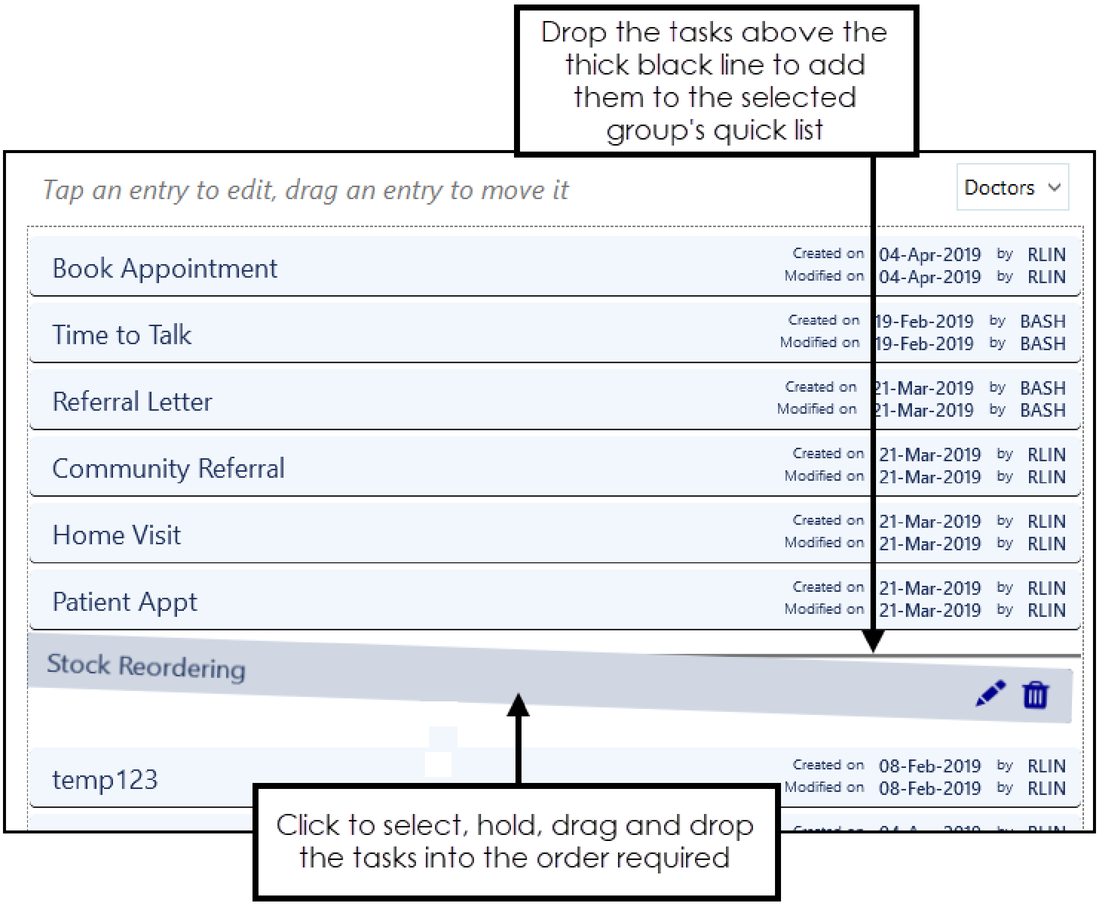
To set up quick lists:

1. From **Tasks**, select **Settings** .
2. Now select **Task Templates** 

and all your **Task Templates** display.
3. From the staff group list, select the staff group you want to set up:



4. Now, hold, drag and drop the templates into the order you require above the thick black line:



5. Ensure the templates under the thick black line are in the order you want for this staff group and once you are happy with the order, select **Save** to save.

The **The templates were updated successfully** message briefly displays.

Important - Some of your staff may be in more than one group, we recommend you review your staff groups before migrating to **Tasks**, however some staff are always in more than one group. Where a member of staff is in more than one group, the templates are offered in the following order: the first template in each staff group the staff member belongs to, then the second template from each group, then the third etc.