

Vision 3 Daybook to Tasks Migration Checklist

This useful checklist details the actions required when migrating to **Tasks** from **Daybook**.

You must ensure you complete all pre-migration actions before your scheduled migration date.



Note - All **Task Templates** (if configured correctly) and all outstanding tasks migrate to **Tasks**. Completed tasks do not migrate. **Staff Groups** configured for **Daybook** work with **Tasks**.

Pre-migration Action by Practice	Yes/No	Comments
Outstanding Tasks Any outstanding Daybook tasks migrate to Tasks . To assist with the migration: <ul style="list-style-type: none"> • Complete as many of your outstanding tasks as possible - Actioning and Completing Tasks (visionhealth.co.uk). • If you have outstanding tasks that require evidencing, complete the task, and add a Clinical Term to the Patient Record or attach a Reminder - Adding Clinical Information to a Task (visionhealth.co.uk). • Complete System Generated tasks, including those sent to the Privacy Officer - Privacy Officer Group (visionhealth.co.uk). 		
Announcements All unexpired Announcements migrate to the new Tasks as outstanding tasks. To address this: <ul style="list-style-type: none"> • Remove any unexpired Announcements making a note of any that require re-entering in Tasks as Announcements post-migration - Creating an Announcement (visionhealth.co.uk). 		

<p>Task Templates</p> <p>Review any Task Templates before migrating to Tasks to ensure the templates are accurate and appropriate.</p> <ul style="list-style-type: none"> It is vital all Task Templates have at least one default recipient, if not, the migration to Tasks will not work - Task Templates in the Daybook Help Centre. You should also update Daybook templates created by Vision to assist with managing Mail Manager messages - Daybook Clinical Review Templates <p>To assist with the migration:</p> <ul style="list-style-type: none"> Delete any Task Templates no longer in use - Task Templates in the Daybook Help Centre. Ensure all Task Templates containing a clinical term are updated to one of the permitted admin codes. Any templates that have codes not included in the list have their clinical term removed during the template migration - Administrative Codes (visionhealth.co.uk). 		
<p>Staff Security Rights</p> <ul style="list-style-type: none"> 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, and allocate tasks from other organisations. To ensure your staff is set up correctly check Security - Security - Add User to Security Group. 		
<p>Staff Groups</p> <ul style="list-style-type: none"> Review, update, and, where necessary, create Staff Groups to optimise the allocation of tasks and the set up of template quick lists - Security - Add User to Security Group. 		

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** - [Managing Staff Email Addresses](#).
- **Training Tip** - Download the [Excel Staff Report](#) and follow the integrated instructions to create a report containing all the details recorded for your staff. This clearly shows which of your staff do not have an email address recorded.