

Tasks Release 2.1

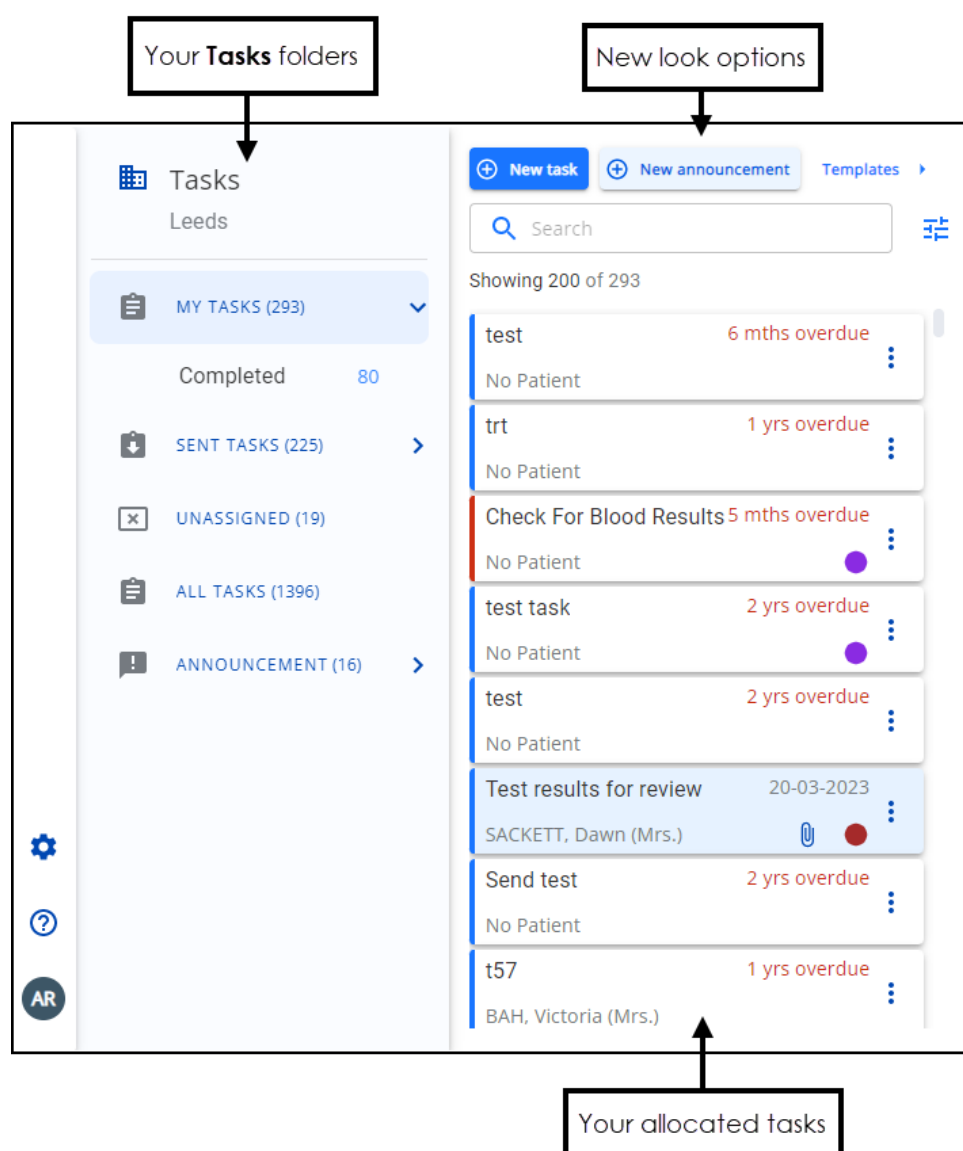
Summary of Changes


Tasks release **2.1** introduces the first part of the move over to new technology. This provides a clearer, more consistent look and experience across all of our applications and, long term, allows us to create software that works for you in the best and most effective way possible.


 **Note** - For full **Tasks** release **2.1** functionality you must have **Vision 3** release **DLM 830** and **Tango** release **2.44**.

Tasks release **2.1** contains the following features and improvements:

- **Main Tasks screen** - The way your **Tasks** folders, your allocated tasks and the **New task**, **New announcement** and **Templates** options display are updated:



- **Filters**  - All task filters are now accessed from the **Filters** option. You can now filter by:
 - **Urgency**
 - **Out of Office** - Only available to System Administrators with **ALL TASKS** selected.
 - **Category**
 - **Assignee** - Only available to System Administrators with **ALL TASKS** selected.
 - **Due Date**
 - **Source**
 - **Grouping**
 - **Sorting**

You can also select **Save View** to save your filter as your **Tasks** default view. If a filter is applied the **Filter** option displays with a pale blue circle behind it .



See [Filtering Tasks](#) on page 4 for full details.

- **Historical Tasks for a Patient** - From a task attached to a patient, in addition to any outstanding tasks, you can now view any completed or deleted tasks for that same patient:

SMITH, Ben (Sir)

Born 01-Aug-1950 (72y) Gender Male NHS 8111156782
 Address GASCOIGNE FARM COTTAGES, 16, MAIN STREET, BARWICK IN ELMET, LEEDS, LS15

Example of task with Attach

Clinical

Sent 06-Mar-2022 13:29

Due 04-May-2023 23:59

From Tim Torbay

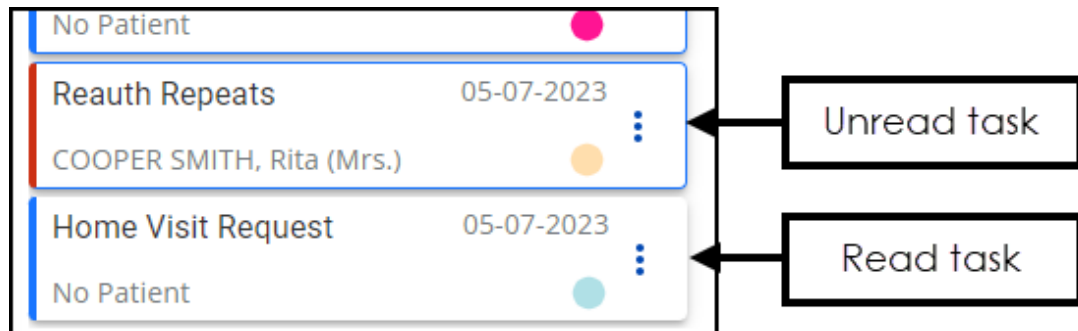
To Alison Rowan

 6 other outstanding tasks associated with this patient
 12 completed tasks associated with this patient
 3 deleted tasks associated with this patient

Attachments

Select the type of tasks to display and your task list updates.

- **Read/Unread tasks** - The way read tasks and unread tasks display is updated. Unread tasks now display with a blue line around them in the selected **Tasks** list:



- **Searching for a task** - This facility has been extended to include searching:
 - NHS/CHI number
 - Recipient

Filtering Tasks

From the main **Tasks** screen, you can set a **Filter** to fine tune the tasks that display in your view.

To set a filter:

1. From the main **Tasks** screen, select **Filters** .
2. The **Filters** screen displays:

Set view Showing 35 of 306 results
 Save View
[Clear View](#)

Filters

☐ Urgent
 ☐ Out of office

Category	Due date	Source
<input type="checkbox"/> Admin ●	<input type="radio"/> None set	<input type="radio"/> All
<input type="checkbox"/> Annual Prescribi... ●	<input type="radio"/> By today	<input type="radio"/> Internal
<input type="checkbox"/> Book Appointment ●	<input type="radio"/> By tomorrow	<input type="radio"/> External
<input type="checkbox"/> Clinical ●	<input type="radio"/> In next 7 days	
<input type="checkbox"/> Contact Patient ●	<input type="radio"/> By end of month	
<input type="checkbox"/> Diabetes Review ●	<input type="radio"/> Custom date range	

Grouping

Group by
 ▼

Sorting

Patient
 ▼

Ascending
 ▼

Select as required:

- **Urgency** - Select the toggle to display only **Urgent** tasks.
- **Out of office** - Only available to System Administrators with **ALL TASKS** selected. This allows you to filter tasks that are assigned to staff that have an **Out of office** set allowing reallocation if necessary.
- **Category** - Tick all category types you require from the list.
- **Assignee** - Only available to System Administrators with **ALL TASKS** selected. This allows you to filter tasks that are assigned to specific staff.
- **Due date** - Select the time frame you require from the list.
- **Source** - Select the source you require from the list.
- **Grouping** - Select from the options available to display tasks together.
- **Sorting:**
 - **Sort by** - Select from the options available to display tasks in the selected order.
 - **Ascending** - Select to display your sorted list in **Ascending** or **Descending** order.

3. The tasks list updates as you make your selection, and **Set view**

Set view Showing 20 of 468 results

displays how many tasks display out of your total number.

If a filter is applied the **Filters** option displays with a pale blue circle behind it



To save this as your default view, select **Save View**  and next time you log in, this filter is applied.

To clear any applied or saved filters, from **Filters** , select **Clear View**

Clear View