Tasks v1.8 Release Guide

Summary of Changes

Note - This release guide incorporates Tasks release 1.8, 1.8.1and 1.8.2.

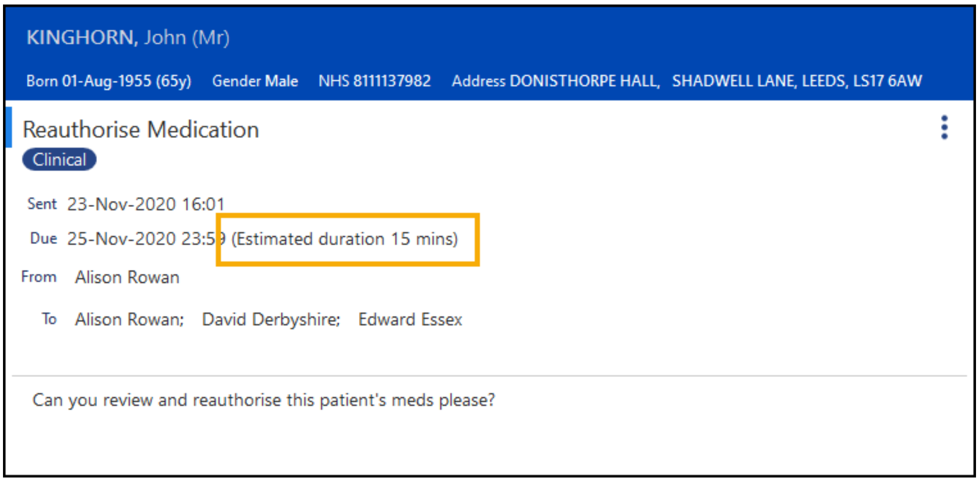
- **Tasks Audit** - **Tasks** now contains a comprehensive audit trail making it easy to search, filter and display any task related historical information you are looking for.

See Tasks Audit on page 3 for details.

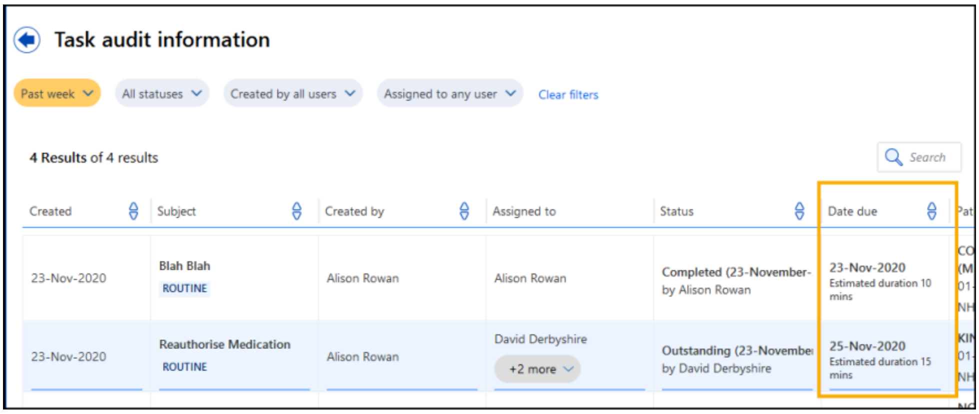
- **Task Templates**:
  - **Estimated Duration** - When adding a new **Task Template** you now have the option to add the amount of time you expect the task created from this template to take. Simply enter the expected time in **Estimated duration**. The **Estimated duration** displays alongside the **Due** date and time.

    The **Estimated duration** also displays:

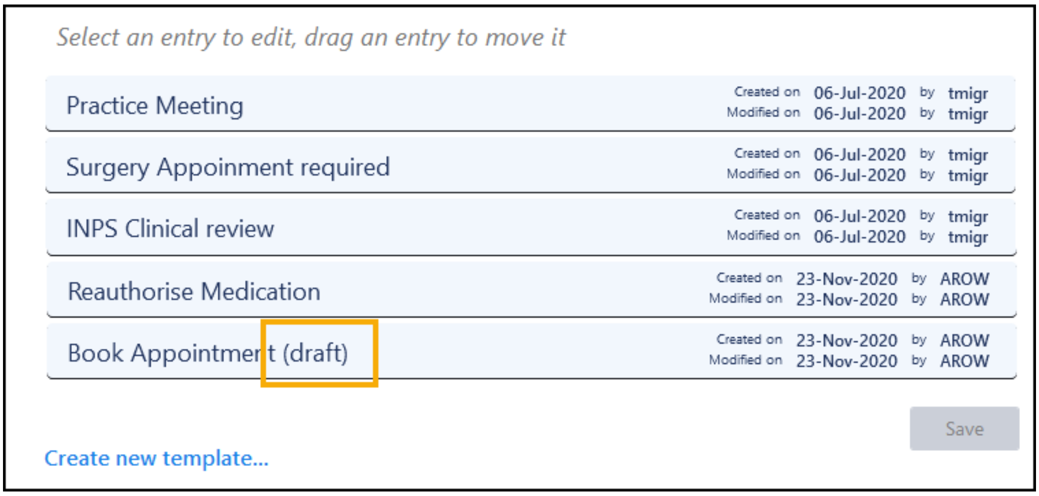
    - Alongside the **Due** date when displaying a task:



- On the **Task Audit** screen, under the **Due date** column:



- **Save as Draft -** You can now save a draft of a **Task Template** should you need to. Select **Save as draft.** Draft templates display in the **Task Template** list with **(draft)** following the template name, where they can selected, finalised and published for use:



See Creating Task Templates on page 8 for details.

- **Tasks in Consultation Manager** - You can now see the details and access a patient's outstanding tasks from the **Reminder** in **Consultation Manager**.

See Using Tasks from Consultation Manager on page 11 for details.

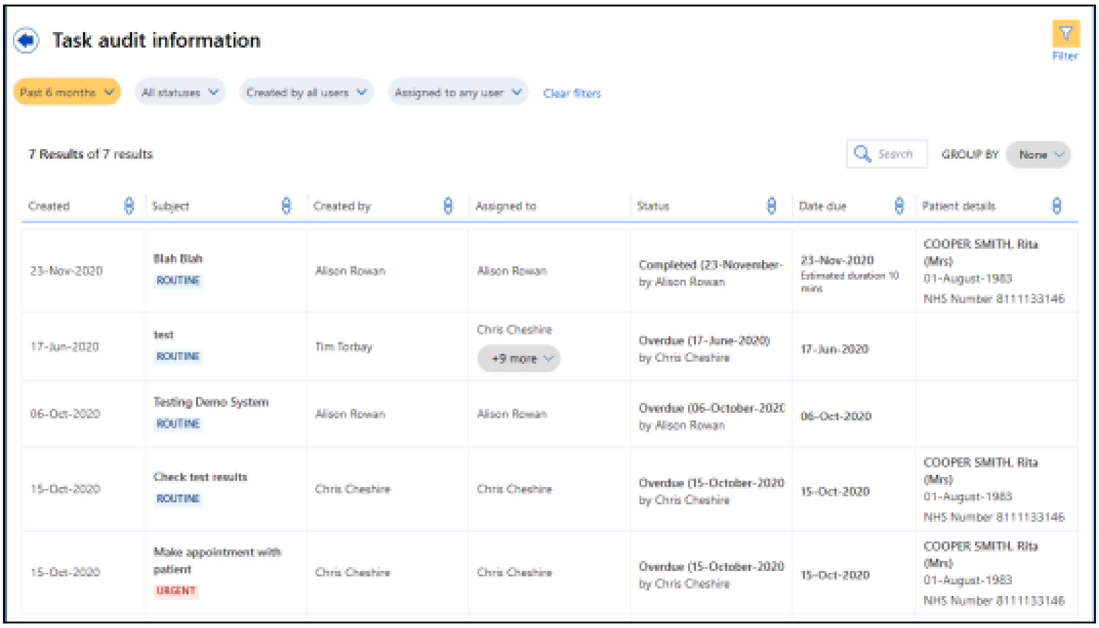
Tasks Audit

The **Tasks Audit** screen displays the history for all tasks in a table format making it easy to search, filter and display exactly the information you are looking for.

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

To access the **Tasks Audit** screen:

1. From any screen in **Tasks**, select **Settings** .
2. Select **Tasks Audit** and the **Tasks Audit** screen displays with **Past week, All statuses, Created by all users** and **Assigned to any user** set as the default filters:



Viewing Audit Information

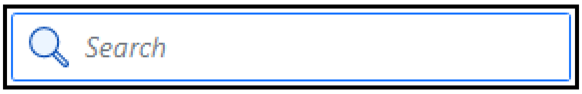
To view the audit information you require you can use any combination of the following options:

Filters Filter / Filter

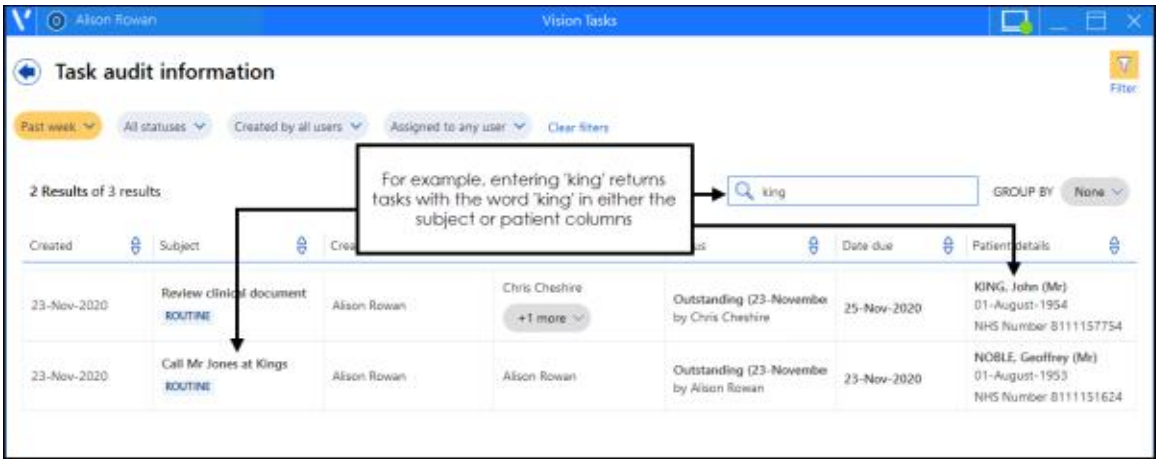
From **Tasks Audit**, select **Filter** Filter, **Filter** Filter now displays in orange and the following options are available:

- **Time Period** All time - Select the time frame you want to display, defaults to the Last week.
- **Status** All statuses - Tick to display the tasks with the selected status. If you select more than one, the number selected displays in brackets.
- **Users** Created by all users - Tick to display the creator of the tasks required. If you select more than one, the number selected displays in brackets.
- **Assigned To** Assigned to any user - Tick to display the recipient of the tasks required. If you select more than one, the number selected displays in brackets.
- **Clear filters** Clear filters - Select to clear all the filters applied.

Search



To search on specific criteria, for example, a particular patient, simply enter the criteria in **Search audit table**. The table updates as you type:



Note - Only the **Subject** and **Patient details - Name and NHS/CHI/H+C Numbers** are included in a search.

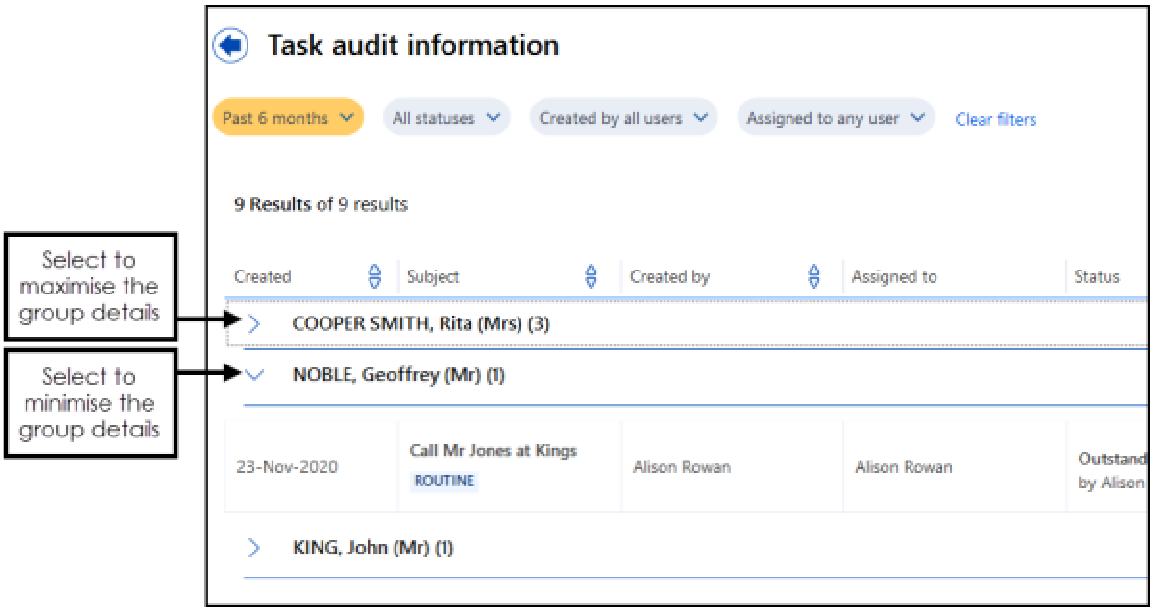
Group by GROUP BY None / GROUP BY Patient

From **Tasks Audit**, select **Group by** GROUP BY None and select from the following to display the returned items by group type:

- None
- Patient
- Urgency
- Status

Group by GROUP BY Patient displays in orange when active.

You can use the up and down arrows on a group header to minimise or maximise the detail that displays:



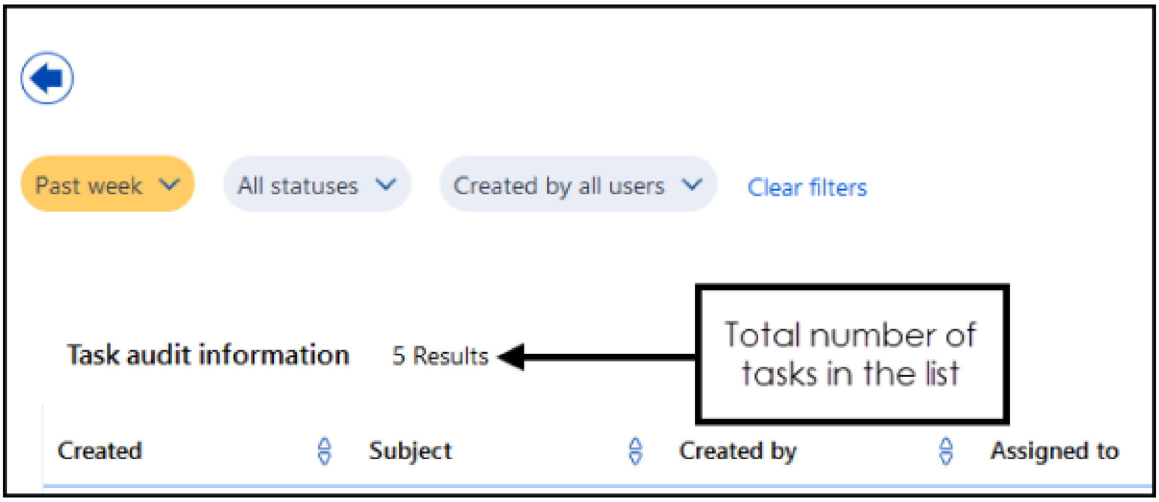
Column Sort /

All the columns on the **Tasks Audit** screen can be sorted, each column has its own options, select **Sort** to display the available list on the column you require. An active **Sort** displays in orange, select **None** to remove the sort.

The following columns display in **Tasks Audit**:

- **Created** - Displays the creation date of a task.
- **Subject** - Displays the **Subject** line of a task and it's **Urgency**.
- **Created by** - Displays the person who created a task.
- **Assigned to** - Displays the list of recipients for a task.
- **Status** - Displays the current completion status of a task.
- **Date due** - Displays the date the task should have been actioned by and any estimate time as entered as part of the template.
- **Patient details** - If a patient is attached to a task, displays their patient name, date of birth and NHS/CHI/H+C number.

The total number of tasks, in any filtered or unfiltered list, displays at the top of the task list alongside **Task audit information**:



Note - If you select the **Filter** Filter the filter options are hidden, simply select the **Filter** again to display them.

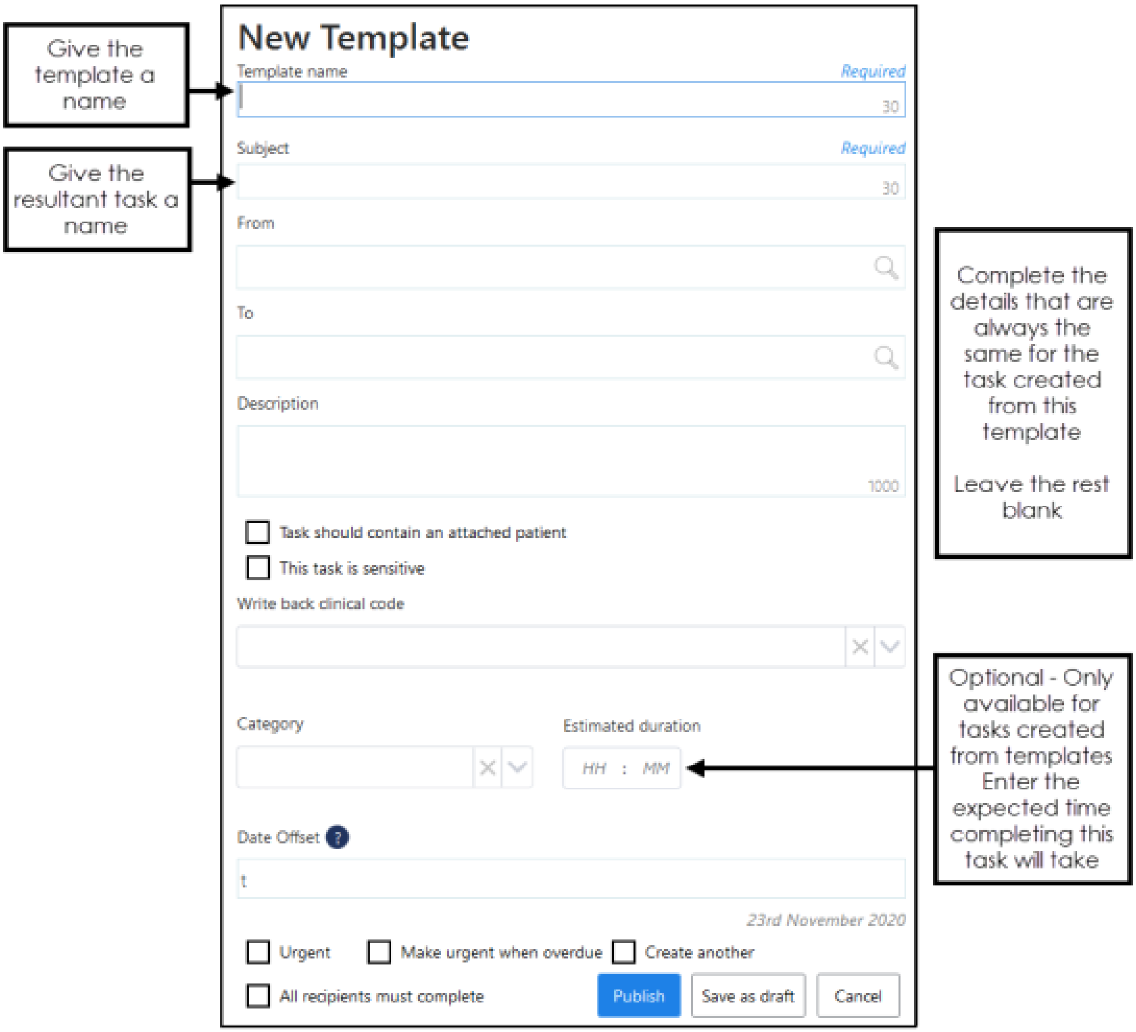
Creating Task Templates

To facilitate fast and accurate task creation throughout your practice, **Task Templates** should be created. It is important you check the list of existing templates before adding new ones, duplications clutter your system and lead to longer selection time for your staff.

> **Note** - You must have administrator rights to access **Settings - Task Templates**, see Security - Add User to Security Group for details.

1. From **Tasks**, select **Settings** .
2. Now select **Task Templates** Task Templates and all your existing task templates display:

3. Select either **Create new template...**and the **New Template** screen displays, or you can select an existing template and select **Copy** :



11. Complete the template with the default details required:

- **Template name** - Used to select the correct template. Enter an appropriate name for this template, a maximum of 30 characters, for example, 'Reauthorise request'.
- **Subject** - Displays for the recipient of the task. Enter the text to display on the task created from this template, this can match the **Template name**, but does not have to.
- **From** (optional) - This defaults to the person creating a task from this template unless a staff member or group is entered here, simply type and select from the smart list offered if appropriate.
- **To** (optional) - If the task this template creates usually goes to the same staff member or group, start typing their name and select from the smart list offered, for example, 'Receptionists'.
- **Description** (optional) - If there is a standard text used each time for this task add it to **Description**, for example, 'Please reauthorise the following repeats,'.
- **Task should contain an attached patient** (optional) - Tick if any task created from this template is usually attached to a patient.
- **This task is sensitive** (optional) - Tick if this task is deemed sensitive.

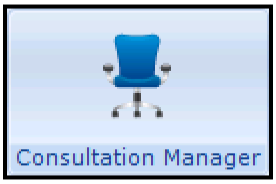
- **Write back clinical code** (optional) - You can select from a predefined list of administrative clinical terms to be added from your template if appropriate.
- **Select a category** (optional) - You can select from a predefined category for your template if appropriate.
- **Estimated duration** (optional) - You can enter an estimated time for completing this task, for example, a review and reauthorise medication is estimated to take 10 minutes.
- **Date Offset** (optional) - If a task created from this template usually has a time frame, using the usual d=days, w=weeks, m=months or y=years short hand, enter the time frame, for example, 2d = 2 days.
- **Urgent** (optional) - Tick, if by default, a task created from this template should be marked as **Urgent**.
- **Make urgent when overdue** (optional) - Tick if, by default, any tasks created from this template should escalate to **Urgent** if not completed within the specified time frame.
- **Create another** (optional) - Tick to create another template once this one is saved/published.
- **All recipients must complete** - Tick to force all recipients to action this task, if not selected only one recipient has to complete the action.

12. Select either:
    - **Publish** to save and make this template available to all.
    - **Save as draft**, to save this template as a draft. It displays in the **Settings - Task Templates** list with **(draft)** following the template name. This is not available for use until you select and **Edit** the draft, make any changes required and then select **Publish**.
13. A '**Template 'name of template here' was completed successfully**' message displays at the bottom of the screen for a few seconds.

> **Note** - If at any time you need to cancel the creation of this Template select at the top right of the **Template** screen.

You should now arrange the templates into quick lists for individual staff groups, if you do not order the templates above the black line for a given group, the members of that group are offered all the available templates in list order.

Using Tasks from Consultation Manager

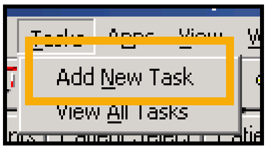
From **Consultation Manager** 

you have various options for either viewing or actioning tasks as well as launching **Tasks**:

Adding a task from Consultation Manager

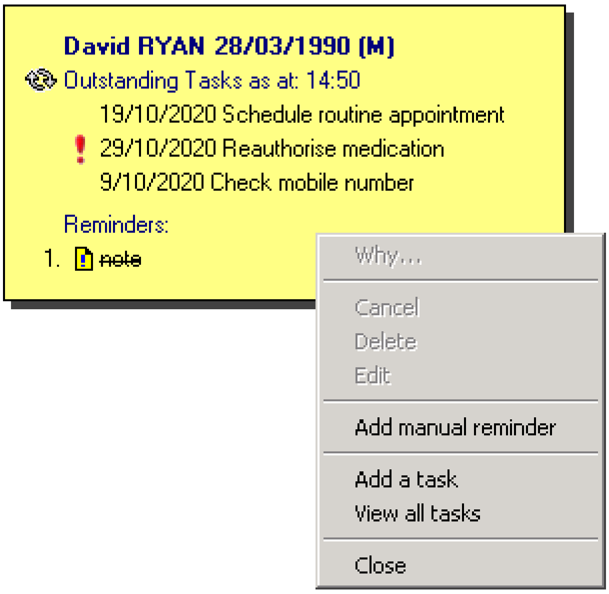
To add a task from **Consultation Manager** either:

1. From **Consultation Manager**, with or without a patient selected, select **Tasks** - **Add New Task**.



or

1. From **Consultation Manager**, with a patient selected, right click on the reminder and select **Add a task**:



2. **Tasks** automatically opens, the **New Task** screen displays, and if you have a patient selected in **Consultation Manager**, they are attached.

Note - If you want to select a task template, you need to close the **New Task** screen, select **Templates** 

and then select the appropriate template.

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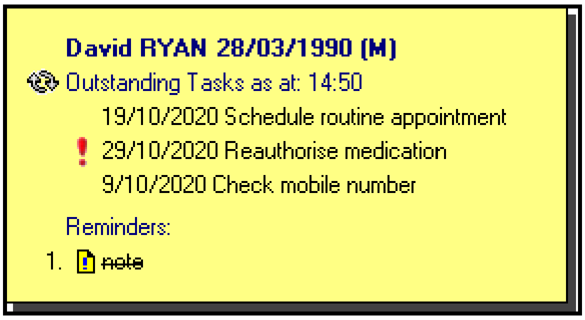
3. Complete the task details as required.

4. Select **Send** Send.
5. Close **Tasks** using the in the top right corner and return to **Consultation Manager**.

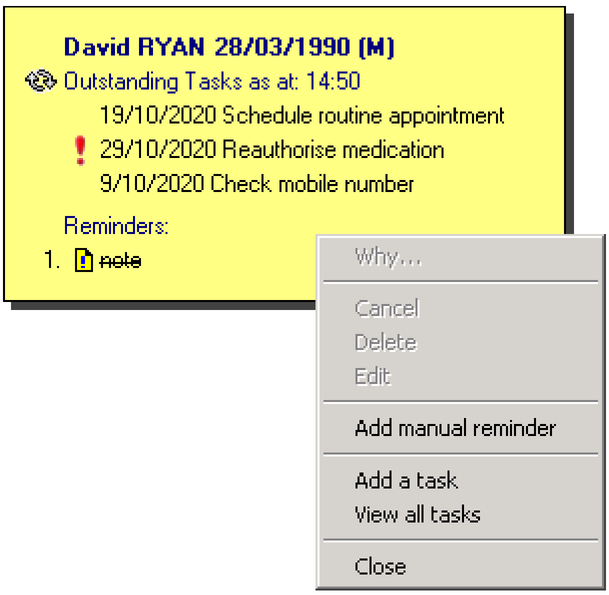
Viewing details of an outstanding task in Consultation Manager

To view the details of an outstanding task in **Consultation Manager**:

1. From **Consultation Manager**, select the patient in the usual way.
2. Providing you have **Reminders** enabled, if the selected patient has any outstanding tasks, they display on the yellow reminder:



3. You can now:
   - Right click on the **Reminder** and select either:
     - **Add a Task** - **Tasks** automatically opens and the **New Task** screen displays with the selected patient attached, or
     - **View all tasks** - **Tasks** automatically opens with the relevant patient selected, all of their outstanding tasks display the most overdue or the first to fall due first. **Tasks** can also be accessed by double clicking on the outstanding tasks:



   - Select **Refresh** to update the list of tasks.