

Tasks v1.8 Release Guide

Summary of Changes

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

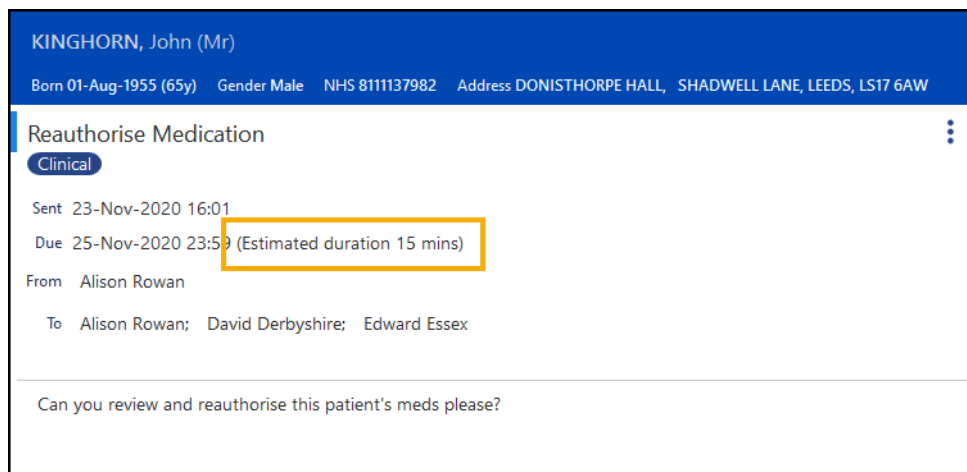
- **Tasks Audit - Tasks** now contains a comprehensive audit trail making it easy to search, filter and display any task related historical information you are looking for.

 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:



The screenshot shows a task card for 'KINGHORN, John (Mr)'. The task is 'Reauthorise Medication' (Clinical). It was sent on 23-Nov-2020 at 16:01. The due date is 25-Nov-2020 at 23:59, with an estimated duration of 15 minutes highlighted in a yellow box. The task is from Alison Rowan and is assigned to Alison Rowan, David Derbyshire, and Edward Essex. The task content asks: 'Can you review and reauthorise this patient's meds please?'.

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

Task audit information

Past week | All statuses | Created by all users | Assigned to any user | Clear filters

4 Results of 4 results

Created	Subject	Created by	Assigned to	Status	Date due
23-Nov-2020	Blah Blah ROUTINE	Alison Rowan	Alison Rowan	Completed (23-November- by Alison Rowan)	23-Nov-2020 Estimated duration 10 mins
23-Nov-2020	Reauthorise Medication ROUTINE	Alison Rowan	David Derbyshire +2 more	Outstanding (23-November- by David Derbyshire)	25-Nov-2020 Estimated duration 15 mins

- **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 be selected, finalised and published for use:

Select an entry to edit, drag an entry to move it

Practice Meeting	Created on 06-Jul-2020 by tmigr Modified on 06-Jul-2020 by tmigr
Surgery Appointment required	Created on 06-Jul-2020 by tmigr Modified on 06-Jul-2020 by tmigr
INPS Clinical review	Created on 06-Jul-2020 by tmigr Modified on 06-Jul-2020 by tmigr
Reauthorise Medication	Created on 23-Nov-2020 by AROW Modified on 23-Nov-2020 by AROW
Book Appointment (draft)	Created on 23-Nov-2020 by AROW Modified on 23-Nov-2020 by AROW

Create new template... Save

➔ 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.

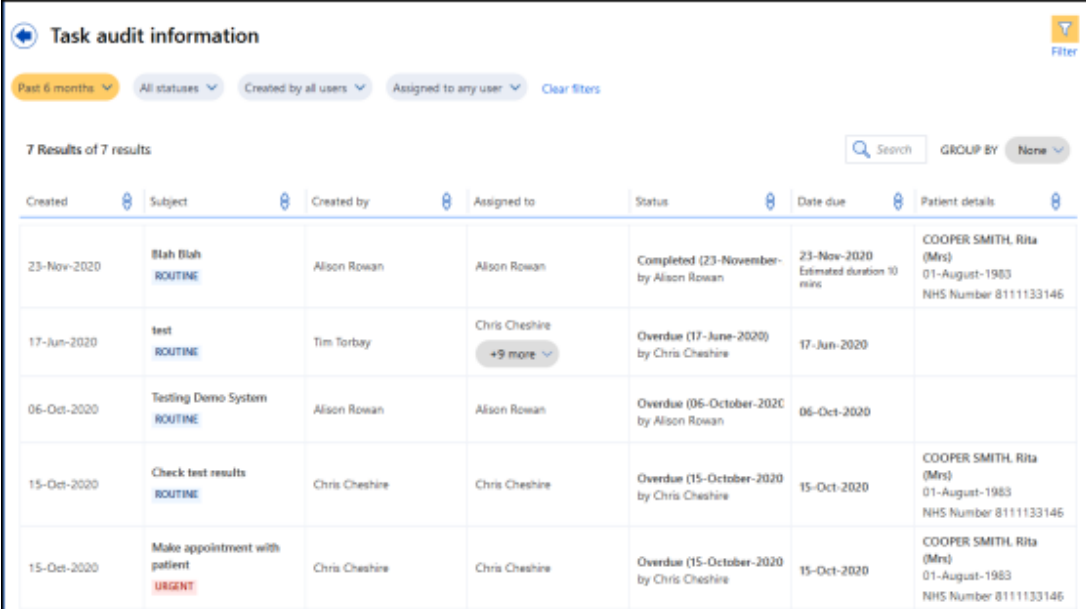
Tasks Audit

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:



Task audit information Filter

Past 6 months | All statuses | Created by all users | Assigned to any user | Clear filters



7 Results of 7 results Search | GROUP BY: None

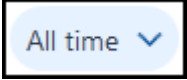

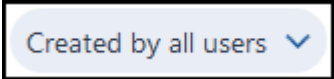
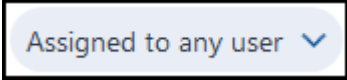

Created	Subject	Created by	Assigned to	Status	Date due	Patient details
23-Nov-2020	Blah Blah ROUTINE	Alison Rowan	Alison Rowan	Completed (23-November-2020) by Alison Rowan	23-Nov-2020 Estimated duration 10 mins	COOPER SMITH, Rita (Mrs) 01-August-1983 NHS Number 8111133146
17-Jun-2020	test ROUTINE	Tim Torbay	Chris Cheshire +9 more	Overdue (17-June-2020) by Chris Cheshire	17-Jun-2020	
06-Oct-2020	Testing Demo System ROUTINE	Alison Rowan	Alison Rowan	Overdue (06-October-2020) by Alison Rowan	06-Oct-2020	
15-Oct-2020	Check test results ROUTINE	Chris Cheshire	Chris Cheshire	Overdue (15-October-2020) by Chris Cheshire	15-Oct-2020	COOPER SMITH, Rita (Mrs) 01-August-1983 NHS Number 8111133146
15-Oct-2020	Make appointment with patient URGENT	Chris Cheshire	Chris Cheshire	Overdue (15-October-2020) by Chris Cheshire	15-Oct-2020	COOPER SMITH, Rita (Mrs) 01-August-1983 NHS Number 8111133146

Viewing Audit Information

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

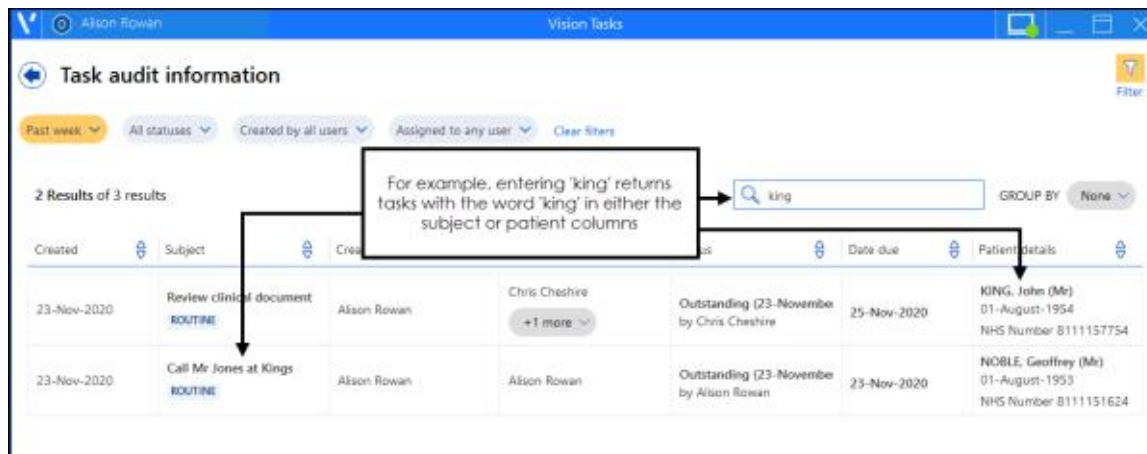


From **Tasks Audit**, select **Filter** , **Filter**  now displays in orange and the following options are available:

- **Time Period**  - Select the time frame you want to display, defaults to the Last week.
- **Status**  - Tick to display the tasks with the selected status. If you select more than one, the number selected displays in brackets.
- **Users**  - Tick to display the creator of the tasks required. If you select more than one, the number selected displays in brackets.
- **Assigned To**  - Tick to display the recipient of the tasks required. If you select more than one, the number selected displays in brackets.
- **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:



For example, entering 'king' returns tasks with the word 'king' in either the subject or patient columns

Created	Subject	Created by	Assigned to	Status	Date due	Patient details
23-Nov-2020	Review clinical document ROUTINE	Alison Rowan	Chris Cheshire	Outstanding (23-November by Chris Cheshire	25-Nov-2020	KING, John (Mr) 01-August-1954 NHS Number: 8111157754
23-Nov-2020	Call Mr Jones at Kings ROUTINE	Alison Rowan	Alison Rowan	Outstanding (23-November by Alison Rowan	23-Nov-2020	NOBLE, Geoffrey (Mr) 01-August-1953 NHS Number: 8111151624

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

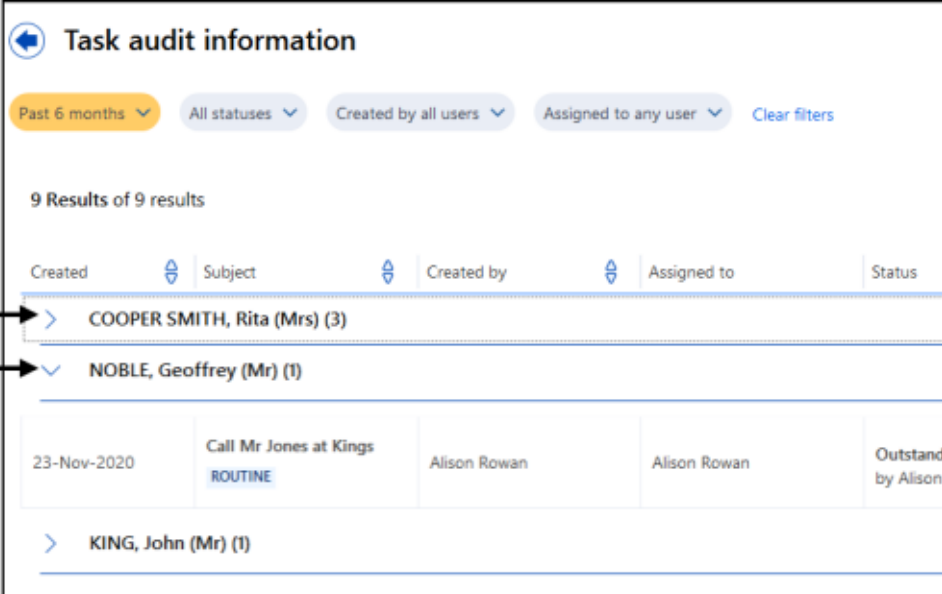


From **Tasks Audit**, select **Group by** GROUP BY None ▾ and select from the following to display the returned items by group type:

- 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:



Task audit information



Past 6 months ▾ All statuses ▾ Created by all users ▾ Assigned to any user ▾ Clear filters

9 Results of 9 results

Created	Subject	Created by	Assigned to	Status
> COOPER SMITH, Rita (Mrs) (3)				
▾ NOBLE, Geoffrey (Mr) (1)				
23-Nov-2020	Call Mr Jones at Kings ROUTINE	Alison Rowan	Alison Rowan	Outstand by Alison
> KING, John (Mr) (1)				

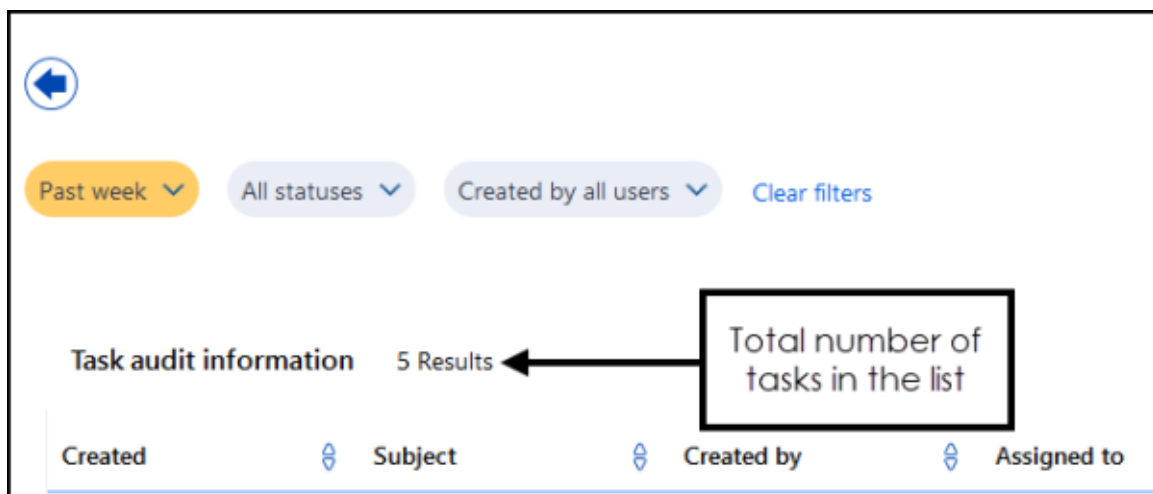
Select to maximise the group details → >
 Select to minimise the group details → ▾

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**:




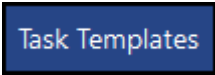
 **Note** - If you select the **Filter**  the filter options are hidden, simply select the **Filter** again to display them.



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**  and all your existing task templates display:



Tap an entry to edit, drag an entry to move it Doctors ▾

Book Appointment	Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN
Time to Talk	Created on 19-Feb-2019 by BASH Modified on 19-Feb-2019 by BASH
Referral Letter	Created on 21-Mar-2019 by BASH Modified on 21-Mar-2019 by BASH
Community Referral	Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN
Home Visit	Created on 11-Mar-2019 by RLIN Modified on 11-Mar-2019 by RLIN
Patient Appt	Created on 12-Mar-2019 by RLIN Modified on 12-Mar-2019 by RLIN
Stock Reordering	Created on 21-Mar-2019 by BASH Modified on 21-Mar-2019 by BASH
temp123	Created on 08-Feb-2019 by RLIN Modified on 08-Feb-2019 by RLIN
Repeat Reauthorise	Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN
Sallys Test template	Created on 12-Mar-2019 by RLIN Modified on 12-Mar-2019 by RLIN

Create new template... Select to add a new template Save

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



Give the template a name


Give the resultant task a name



Complete the details that are always the same for the task created from this template. Leave the rest blank

Optional - Only available for tasks created from templates. Enter the expected time completing this task will take

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

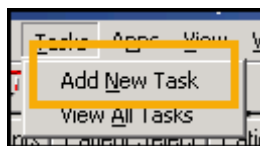


From **Consultation Manager** you have various options for either viewing or actioning tasks as well as launching **Tasks**:

Adding a task from Consultation Manager

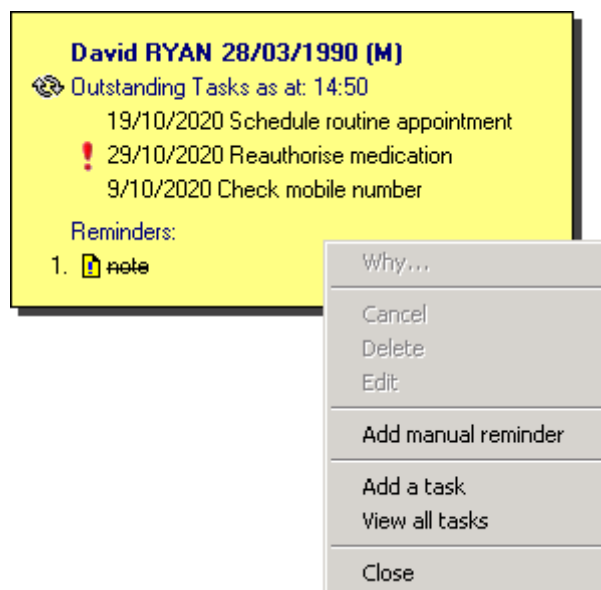
To add a task from **Consultation Manager** either:

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





or

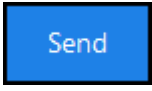

1. From **Consultation Manager**, with a patient selected, right click on the reminder and select **Add a task**:



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.

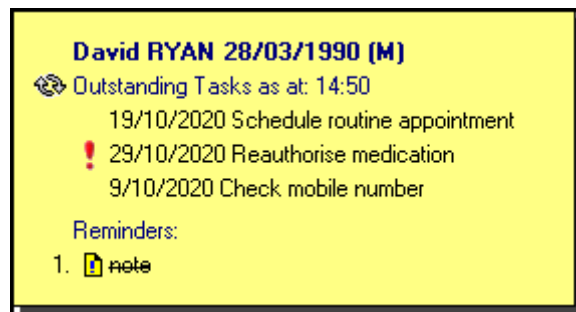
3. Complete the task details as required.

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

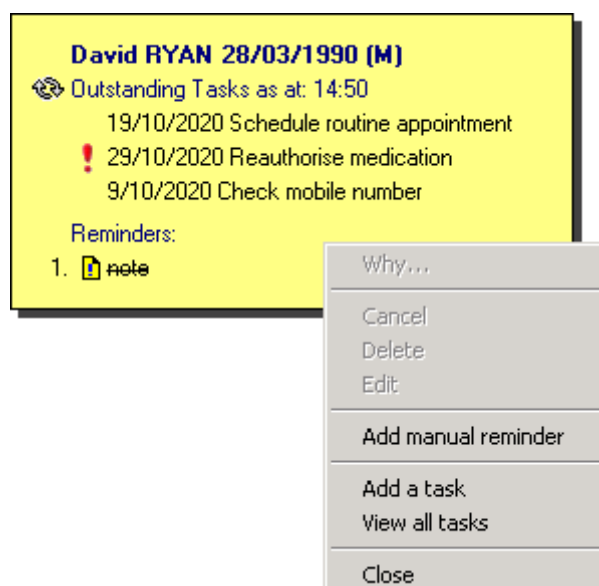
Viewing details of an outstanding task in Consultation Manager

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.