

Tasks v1.9 Release Guide

Summary of Changes

Tasks release **1.9** contains the following new features and improvements:

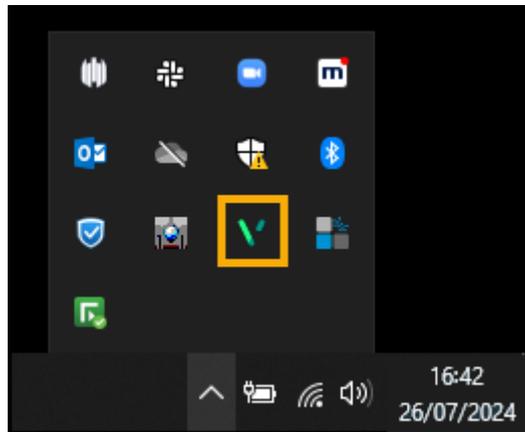
- **Single Sign On (SSO)** - In preparation for single sign on across all Cegedim Primary Care Solutions, when you log into **Tasks**, you are now presented with the Vision Single Sign On screen:



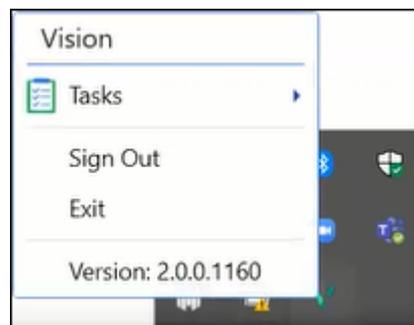
i Important - It is vital that the first time you log on to **Tasks**, following the **1.9** update, you are connected to the internet. This ensures your **SSO** set up runs correctly.

Simply enter your registered email address and password in the usual way and select **Sign in**, this triggers the **SSO** update. Single Sign on enables you to switch between applications without having to log in again.

- **System Tray Settings** - The **System Tray Settings** have been updated ready for the release of our exciting new applications. Select the **System Tray Arrow**  and right click the **Vision** logo:



The **Vision** menu displays:



Select as required:

- **Tasks:**
 - **Open** - Select to open **Tasks**.
 - **Quit** - Select to close **Tasks**.
- **Sign Out** - Select to close all **Cegedim Primary Care Solutions**.

 **Note** - This leaves the SSO application running on your machine. You can switch between applications without the need to sign in.

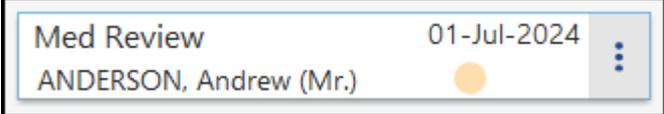
- **Exit** - Select to close all **Cegedim Primary Care Solutions**.

 **Note** - This closes the SSO application on your machine. To open an application, you must sign in again.

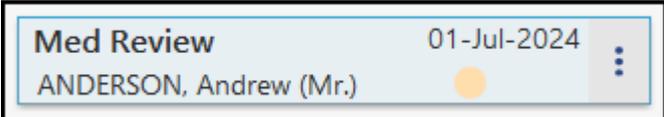
- **Tasks in your List** - The way tasks display in your task lists have been updated to more clearly differentiate between read, unread and selected tasks:



Read task.



Read task you are hovering over, note the thin blue line around the task.

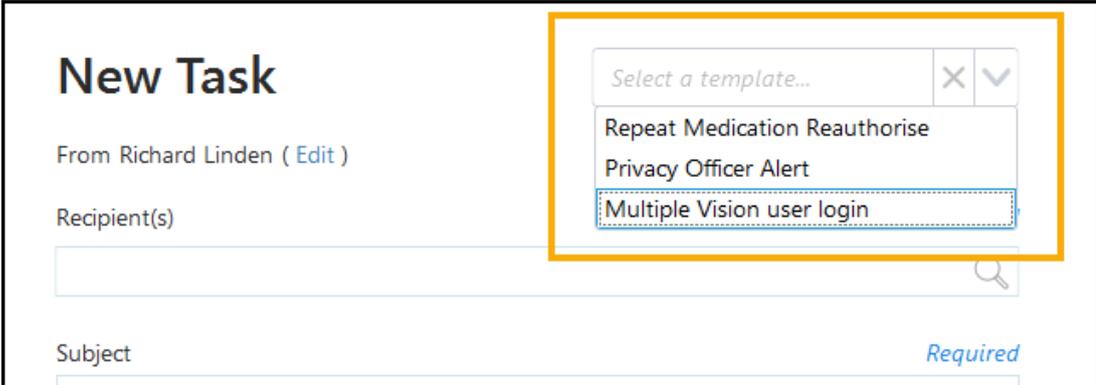


Selected task displays in grey.



Unread tasks display in pale blue.

- **Task Templates** - You can now select a Task Template from within the **New Task** screen:



- **Notify me when complete** - You can now select to be notified when a task is completed by its recipient(s):

 **Note** - The **Notify me when complete** option is not available if you select to send the task to yourself only.

- **New Task** - Tick **Notify me when complete** to automatically receive an announcement when the task is marked **Complete**:

New Task

Select a template...

From Alison Rowan ([Edit](#))

Recipient(s) *Required*

Subject *Required*

30

Description

1000

Please note: you may not edit or delete attached patient links once they have been saved to a task

Attachments

Category

Due Date/Time *Required*

This task is sensitive Urgent Make urgent when overdue

All recipients must complete

Notify me when complete

Create another

- **New Template** - Tick **Notify me when complete** for the originator to automatically receive an announcement when any task created from the template is marked **Complete**:

New Template

Template name Required
 30

Subject Required
 30

From

To

Description
 1000

Task should contain an attached patient

Write back clinical code

Category Estimated duration
 HH : MM

Date Offset ?
 26th July 2024

This task is sensitive Urgent Make urgent when overdue

All recipients must complete

Notify me when complete

Create another



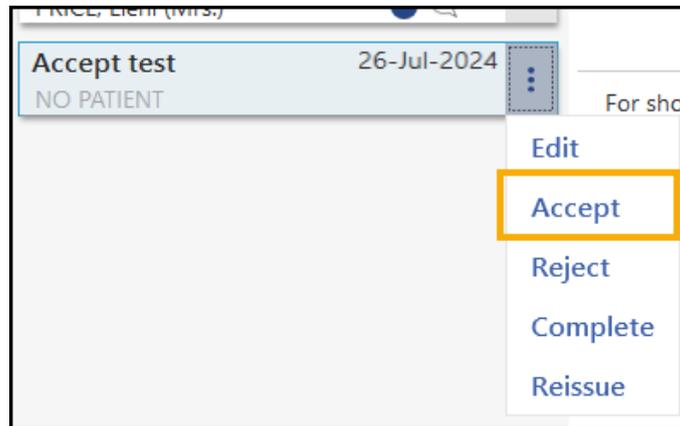
Training Tip - When creating a task from a template the **Notify me when complete** tick can be removed if it is not required.

When a recipient completes a task, a **Task completed** announcement is automatically sent to the originator of the task. **Task Completed** announcements expire after seven days:

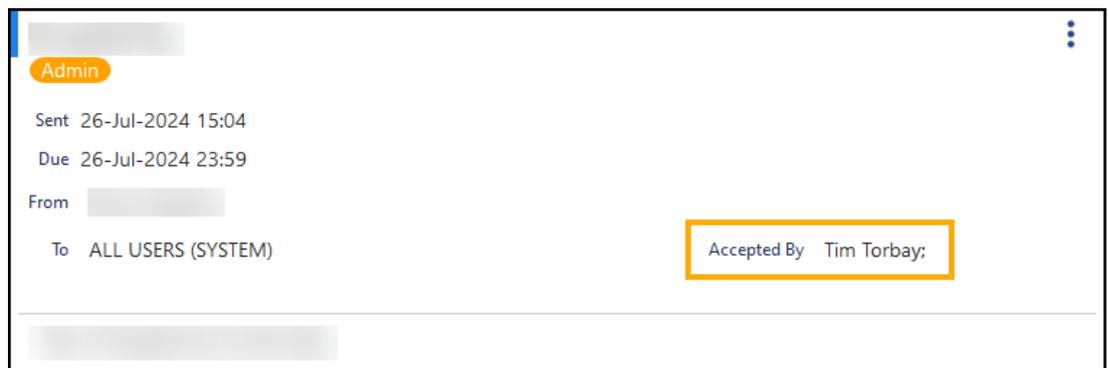


- **Accepting a Task** - If a task is allocated to a group you are a member of, you can select to **Accept** it. This indicates to all other recipients and the originator that you are planning on actioning it. To mark a task as accepted:

1. From your **My tasks** list, select **Options** .
2. Select **Accept**:

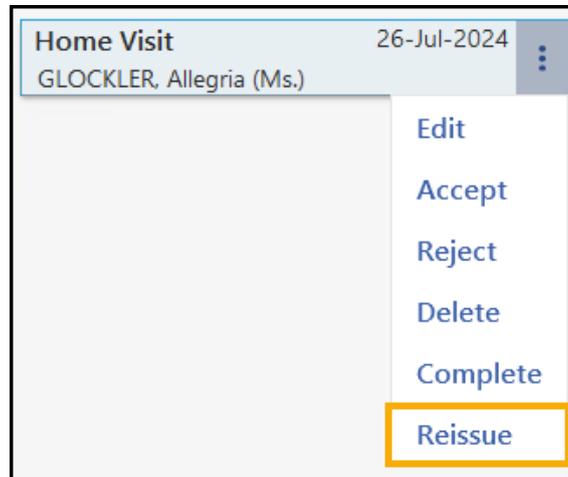


The new **Accepted by** section on the task updates with your name:



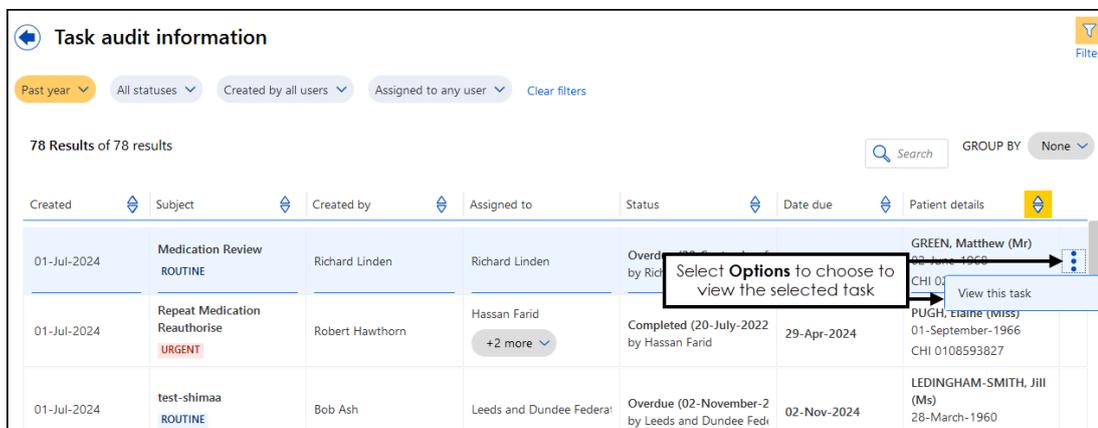
 **Note** - Even if a member of the group has accepted a task, it is still available for any member of the group to complete.

- **Reissuing Tasks** - If a task is allocated to you in error, or you need to send it on to another member of staff, you can now select **Options**  - **Reissue**:



The **Edit Task** screen displays with a blank **Recipient(s)**. Choose the new recipient(s) from the available list and select **Update** to reallocate the task.

- **Tasks Audit** - You can now open a task from the **Tasks Audit** screen for viewing purposes. From the end of the audit row, select **Options**  - **View this task**:



Created	Subject	Created by	Assigned to	Status	Date due	Patient details
01-Jul-2024	Medication Review ROUTINE	Richard Linden	Richard Linden	Overdue (20-Jul-2022) by Richard Linden		GREEN, Matthew (Mr) 01-June-1966 CHI 0108593827
01-Jul-2024	Repeat Medication Reauthorise URGENT	Robert Hawthorn	Hassan Farid +2 more	Completed (20-Jul-2022) by Hassan Farid	29-Apr-2024	PUGH, Elaine (Miss) 01-September-1966 CHI 0108593827
01-Jul-2024	test-shimaa ROUTINE	Bob Ash	Leeds and Dundee Federat	Overdue (02-November-2) by Leeds and Dundee Fedi	02-Nov-2024	LEDINGHAM-SMITH, Jill (Ms) 28-March-1960

 **Note** - View this task is for display purposes only, you cannot update the task from here.

- **Out of Office** - The **Out of Office** functionality has been updated:
 - System Administrators now have the ability to set up an out of office setting for other members of staff. This is designed to cover unexpected absences.
 - The **Out of Office** toggle is removed

 See **Setting an Out of Office** on page 8 for full details.

Setting an Out of Office

To ensure tasks are processed when staff are away, an out of office should be set up to cover any absence.

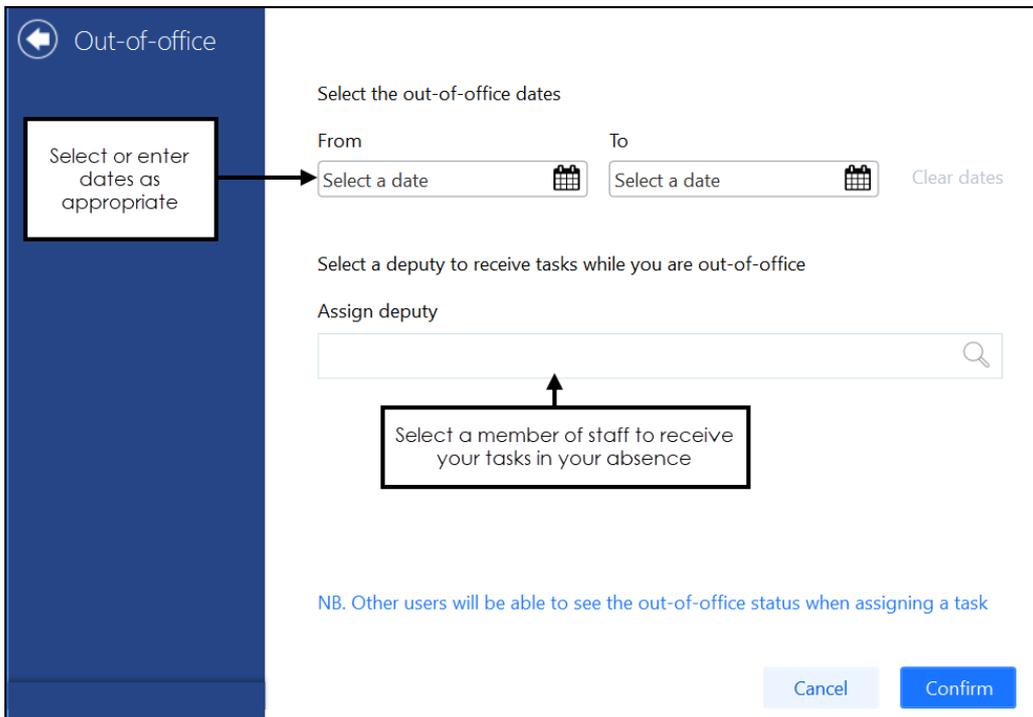
An out of office can be set up by either the staff member themselves for a planned absence, or a System Administrator for a member of staff with an unplanned absence.

Once an out of office is set, any tasks sent to the recipient automatically divert to the assigned deputy.

 **Note** - The original recipient does not receive a copy of a diverted task.

To set up an out of office notification:

1. From any screen in **Tasks**, select **Settings** .
2. Select **Out of office** and the **Out of Office** screen displays, this screen varies depending on your security settings:
 - Standard staff member:



Select or enter dates as appropriate

Select the out-of-office dates

From To [Clear dates](#)

Select a deputy to receive tasks while you are out-of-office

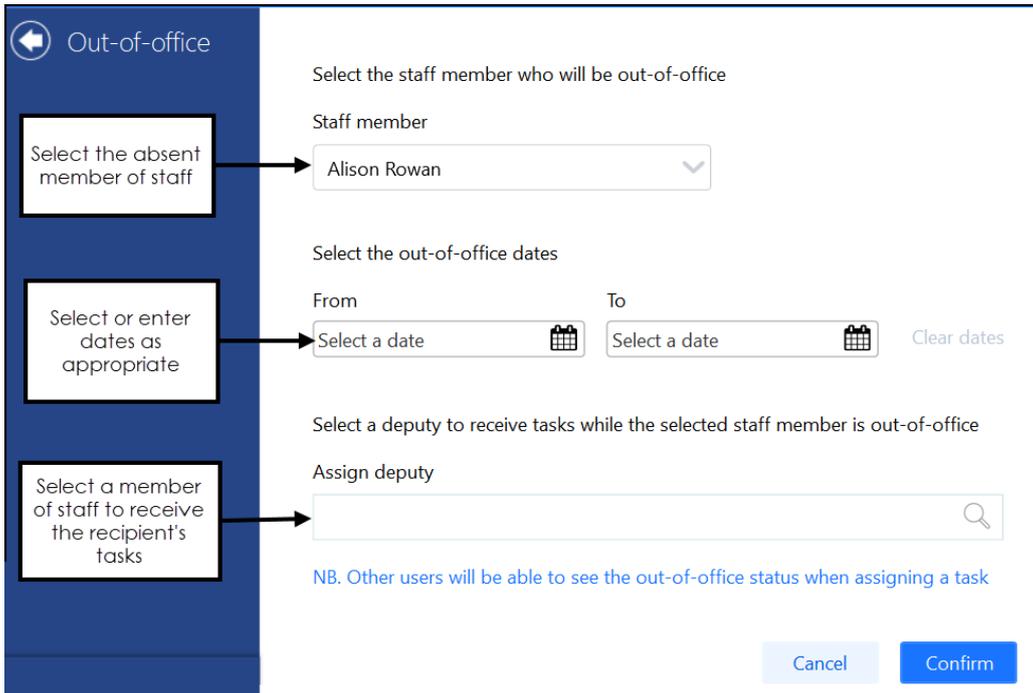
Assign deputy

Select a member of staff to receive your tasks in your absence

NB. Other users will be able to see the out-of-office status when assigning a task

[Cancel](#) [Confirm](#)

- System Administrator:



The screenshot shows the 'Out-of-office' configuration interface. On the left, a dark blue sidebar contains three callout boxes with arrows pointing to specific form fields:

- The top callout box, labeled 'Select the absent member of staff', points to the 'Staff member' dropdown menu which currently displays 'Alison Rowan'.
- The middle callout box, labeled 'Select or enter dates as appropriate', points to the 'From' and 'To' date selection fields, both of which currently show 'Select a date'.
- The bottom callout box, labeled 'Select a member of staff to receive the recipient's tasks', points to the 'Assign deputy' search input field.

The main form area includes the following elements:

- A back arrow and the title 'Out-of-office'.
- The instruction: 'Select the staff member who will be out-of-office'.
- The 'Staff member' dropdown menu.
- The instruction: 'Select the out-of-office dates'.
- The 'From' and 'To' date selection fields, each with a calendar icon, and a 'Clear dates' link.
- The instruction: 'Select a deputy to receive tasks while the selected staff member is out-of-office'.
- The 'Assign deputy' search input field.
- A note: 'NB. Other users will be able to see the out-of-office status when assigning a task'.
- 'Cancel' and 'Confirm' buttons at the bottom right.

Complete as required:

- **Staff member** (System Administrators only) - Select the member of staff you are setting this out of office for, select yourself if this is to cover your own absence.
 - **From** - Select a date for your out of office message to begin.
 - **To** - Select a date for your out of office message to finish.
 - **Select a deputy to receive tasks while you are out-of-office** - Under **Assign deputy** select a member of staff or a group to receive your/the recipients tasks during the time span set up.
3. Select **Confirm** to save your Out of Office settings.

Once you have set an out of office:

- If someone selects a group you are a member of, the number of staff with an out of office/total number of staff in the group is shown in brackets.
- If someone selects you to receive a task, your name displays in red:

New Task

From Richard Linden ([Edit](#))

Recipient(s) Required

Bob Ash

Practice User

Staff member with an out of office set

Robert Hawthorn

Practice User

Sheena Beech

Practice User

- A diverted task displays as **REDIRECTED** on the **Activity** tab:

Conversation	Activity	
09-Apr-2019 10:18:32	Task was created.	Alison Rowan
09-Apr-2019 10:18:32	Richard Linden is out of office. Task will be redirected to their deputy: Bob Ash	REDIRECTED