Vision Tasks
Using Tasks in a Shared Care Setting

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V1.1

cegedim
Healthcare Solutions

Contents

Using Tasks in a Shared Care Setting

Most **Tasks** functionality is the same whether you are accessing your practice's patients or you are working in a shared care setting.

The following functionality is specific to shared care access:

- **Uploading Emis patients** - In order to have access to all the **Emis** patient data available within your shared care setting, you must upload it to **Vision 360.**

  See Uploading Patients from Emis to Vision 360 on page 5.

- **Logging in** - When you log in to **Tasks**, you have the option to select your local practice or your shared care service.

  See Logging in from Your Desktop on page 9.

See the following topics for the basic **Tasks** functionality:

- Creating a Task on page 12.
- Creating a Task from a Template on page 16.
- Processing a Task on page 21.
- Receiving and Allocating Cross Organisational Tasks on page 24.

Uploading Patients from Emis to Vision 360

In order to have access to all the **Emis** patient data available within your shared care setting, you must upload it to **Vision 360**. You should run an initial upload and then a daily update.

To upload and update your patient list to **Vision 360**:

1.   From your desktop, double click **Patient Demographic Uploader**

2.   The **Vision - Patient Demographic Uploader** and **npm** screens display:
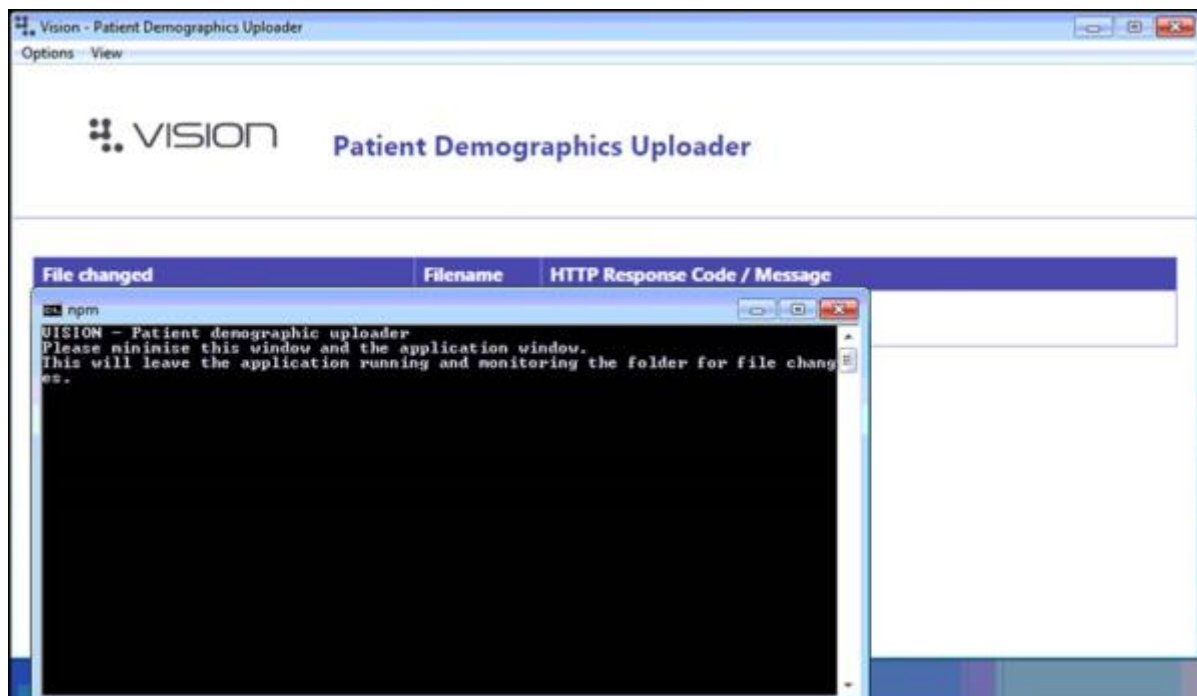
3. Open **Emis Web**, if it is not already open and select **Reporting – Population Reporting**:

4. Double click the **INPS** or **Vision** folder and the **INPS/Vision – Patient Report** displays:

5. Select **Run**.

6. Once the report completes, select **View Results** .
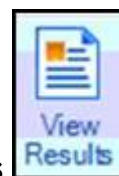
7. The **INPS - Patients** tab displays, select **Export** .

8. The **Export Report** screen displays, select **CSV**:
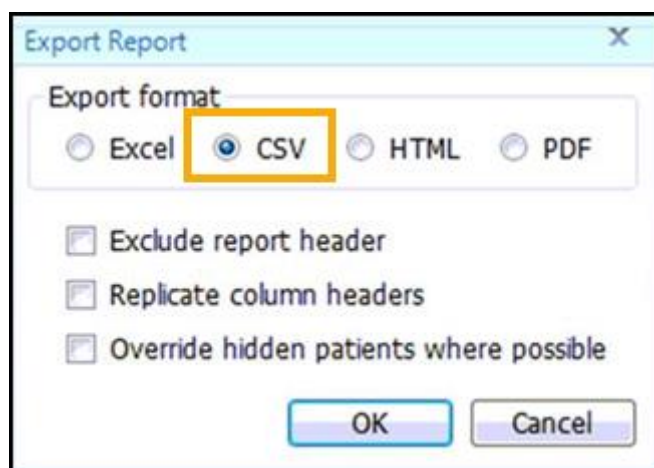
9. Select **OK**.

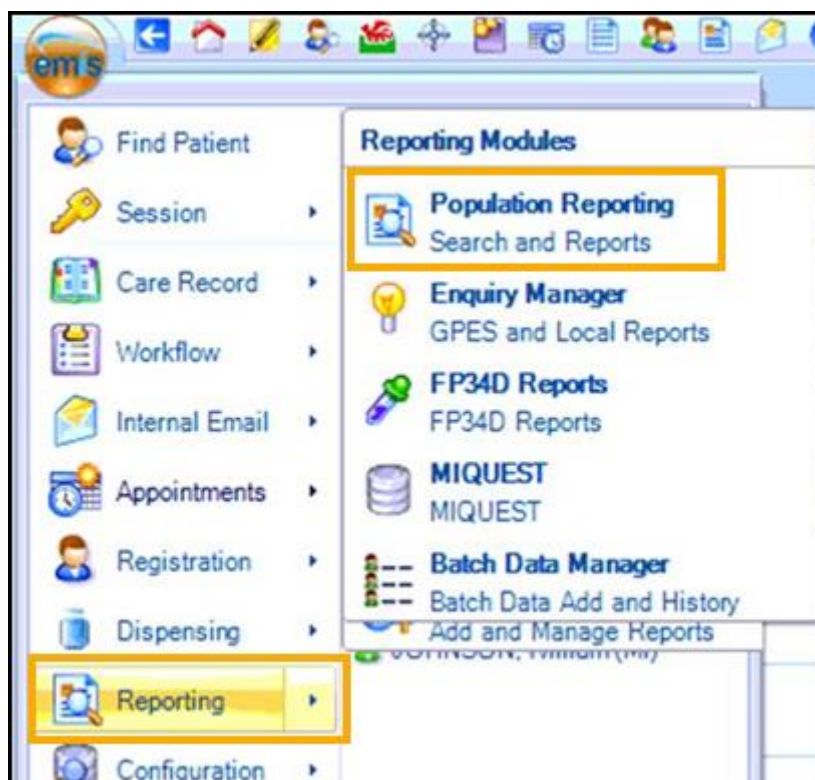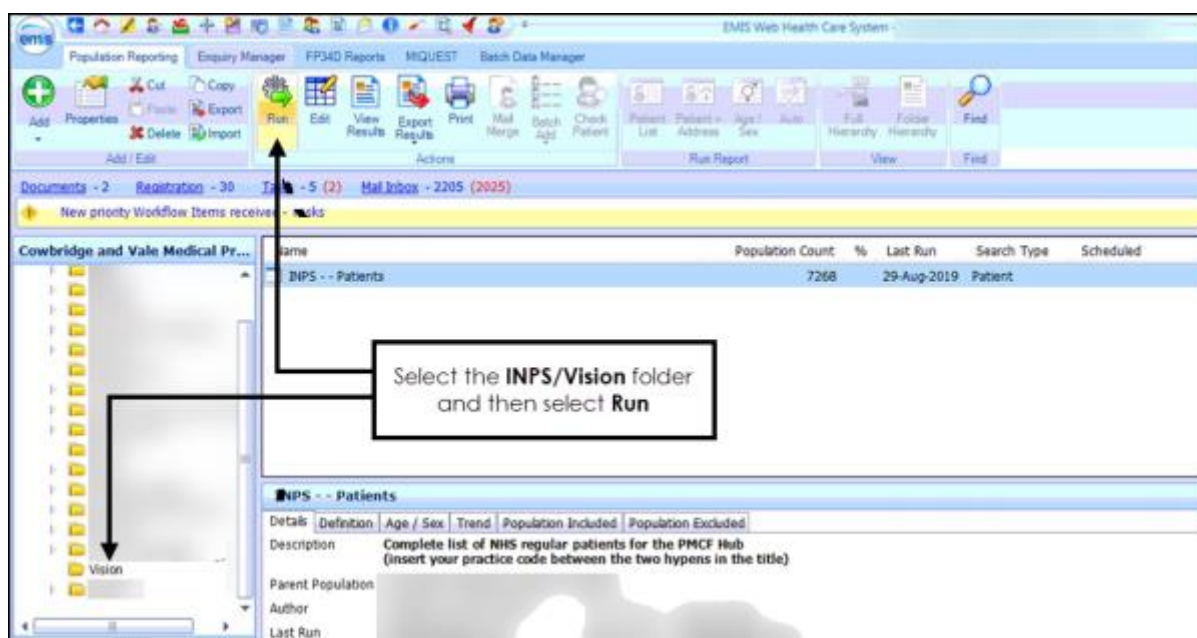10. The **Save As** screen displays, navigate to **C:\Vision\vision_upload\upload_files** and double click on any existing report in this folder to overwrite it.

11. The **Confirm Save As** screen displays, select **Yes** to confirm.

12. The upload of your patient demographic starts. This takes approximately 15 minutes to complete, you can view the process by selecting **Vision** from your task bar, today's date, time and the response code of **Waiting** should display, this updates to **OK** once successfully completed:

13. Once the upload successfully completes, you can close the **Vision - Patient Demographic Uploader** and **npm** screens.

Once the file is exports the **Vision Client** automatically uploads it to the central system and processes your patient demographics.

> ✏ **Note** - **Emis** can be used during the upload process as it happens in the background.

> ℹ **Important** - If a **No connection to Vision** message displays, please contact the **Cegedim Healthcare Solutions Helpdesk** in the usual way.
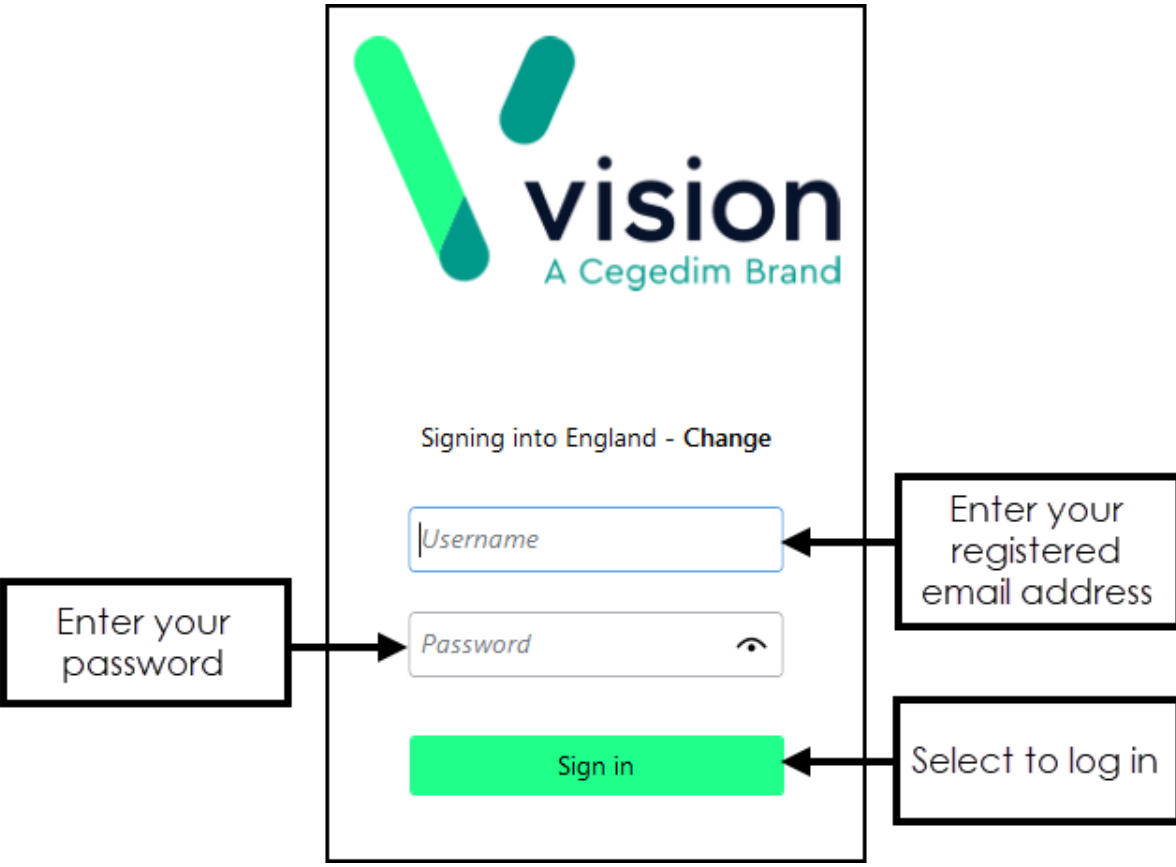
Logging in from Your Desktop

If you are not a **Vision 3** user, or you want to use **Tasks** in a shared care setting, to log in:

1. From your Windows desktop:

   - **Windows 10** - Select **Start** - **Tasks** .

   - **Windows 7** - Select **Start** - **Tasks** .

2. The **Vision login** screen displays:

3. Select **Username** and enter your registered email address.

4. Select **Password** and enter your password, select **View** to display your password as you type.

> ✏️ **Note** - Your **Username** and **Password** are setup when **Tasks** is installed.

5. Now, select **Sign in**.

6. You must now select your role for this session:

7. **Tasks** displays with **My tasks** selected:
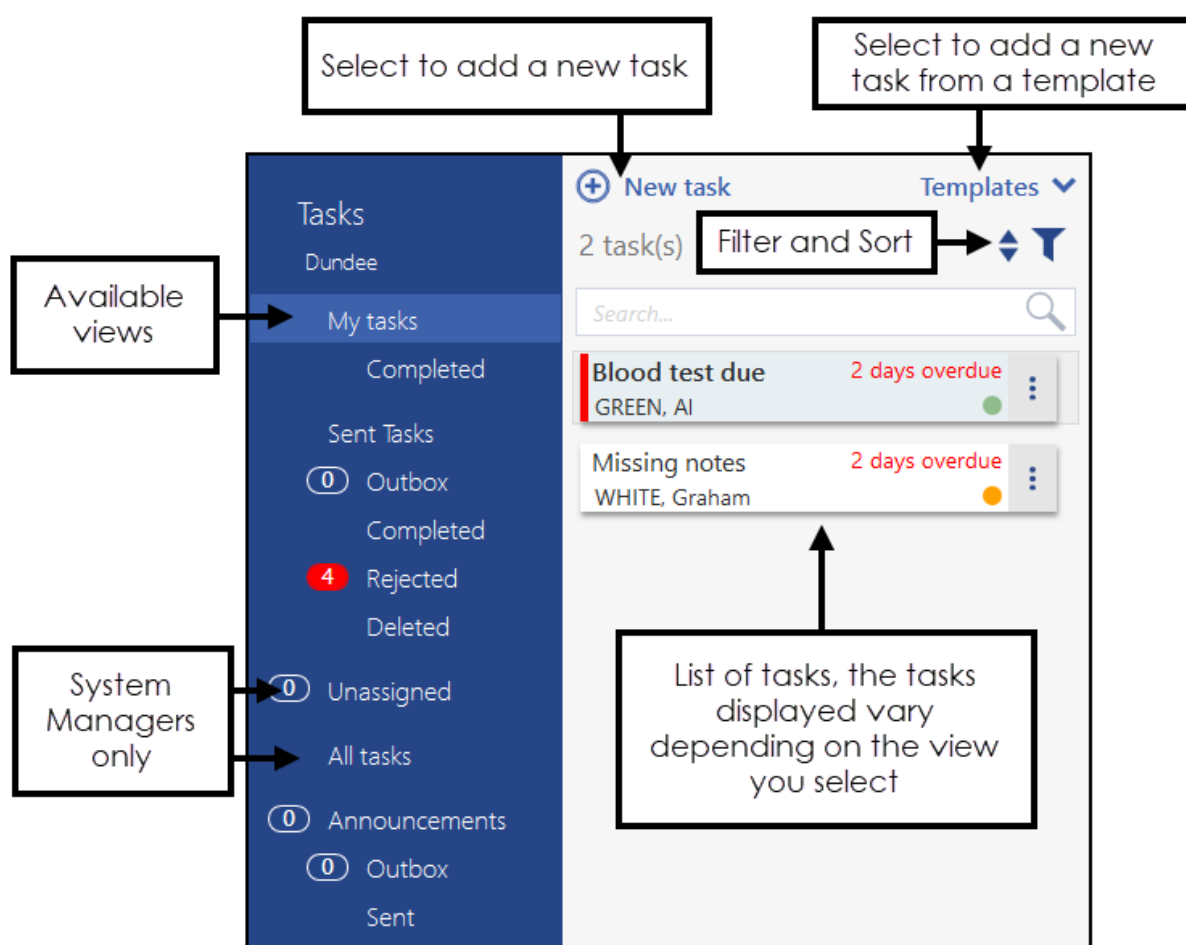
✏️ **Note** - First time you select **Tasks** you are asked to select your country/health board. Simply select the appropriate response from the available list and select **Continue**.

Tasks

Creating a Task

Tasks can be created from:

Consultation Manager - Tasks

To add a task:

1. From **Consultation Manager** , select the patient in the usual way.

2. Select **Tasks - Add New Task**:
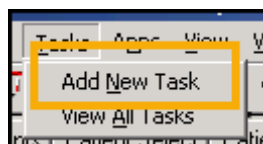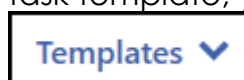
3. **Tasks** automatically opens, the **New Task** screen displays and the selected patient details populate automatically. If you want to select a task template, you need to close the **New Task** screen, select **Templates** and then select the appropriate template.

Reminders

To add a task from a reminder in either **Consultation Manager**

 or **Appointments** :
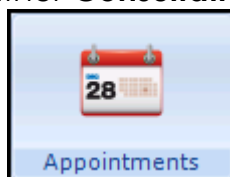
1. Simply right click on the reminder and select **Add task**.
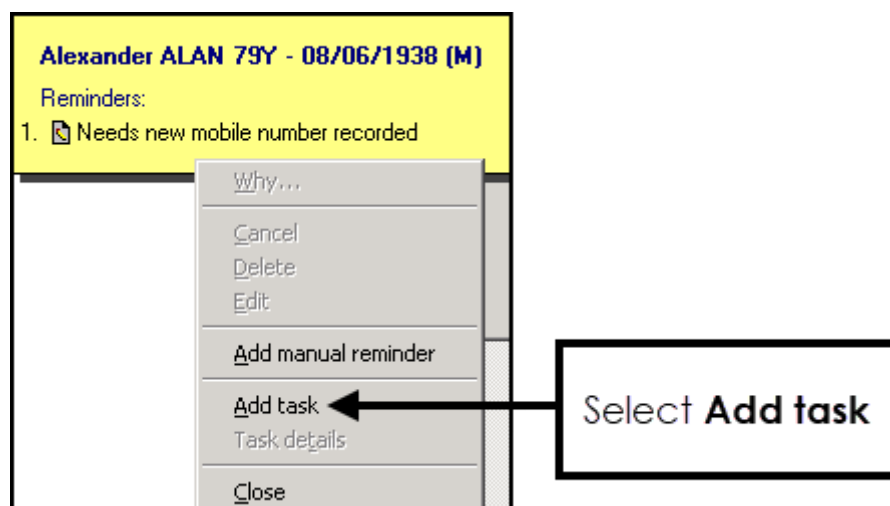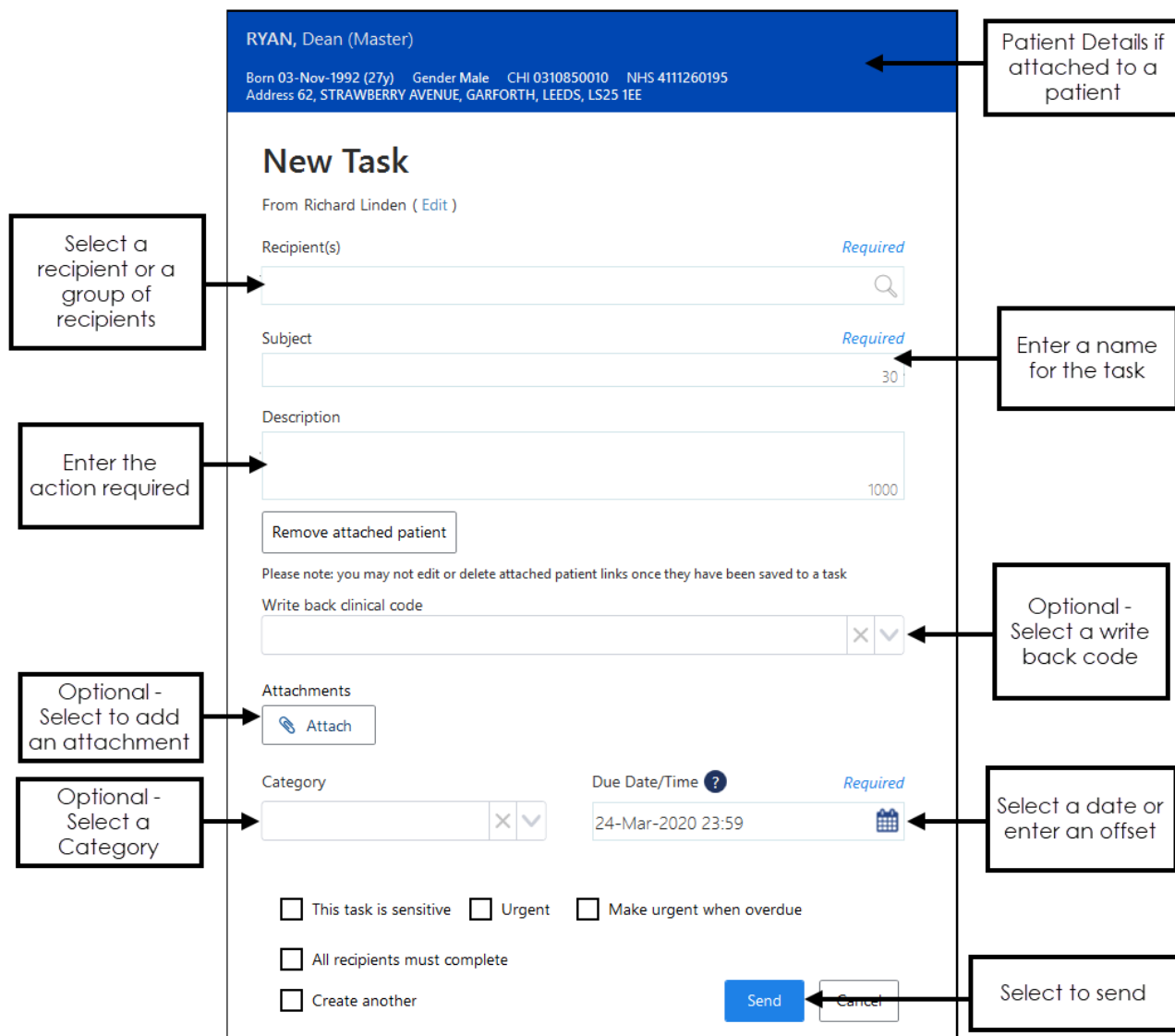
2. **Tasks** automatically opens, the **New Task** screen displays and the selected patient details populate automatically. If you want to select a task template, you need to close the **New Task** screen, select **Templates** and then select the appropriate template.

Tasks itself

From any task screen within Tasks, select **New task** [⊕ New task].

1. The **New Task** screen displays:

Patient Details if attached to a patient

RYAN, Dean (Master)
Born 03-Nov-1992 (27y)   Gender Male   CHI 0310850010   NHS 4111260195
Address 62, STRAWBERRY AVENUE, GARFORTH, LEEDS, LS25 1EE

New Task

From Richard Linden (Edit)

Select a recipient or a group of recipients

Recipient(s)   Required

Subject   Required
                                                                    30

Enter a name for the task

Enter the action required

Description
                                                                  1000

Remove attached patient

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

Write back clinical code
                                                              × ∨

Optional - Select a write back code

Optional - Select to add an attachment

Attachments
📎 Attach

Optional - Select a Category

Category   Due Date/Time ❓   Required
                                × ∨   24-Mar-2020 23:59   🗓

Select a date or enter an offset

☐ This task is sensitive   ☐ Urgent   ☐ Make urgent when overdue

☐ All recipients must complete

☐ Create another   Send   Cancel

Select to send

2. Complete as required:

- **From** (optional) - If you are creating this task on behalf of a group of staff you are a member of, select **Edit** and select the appropriate group.

- **Recipient(s)** - Select the recipient of this task, this can be one or more individual members of staff, yourself to act as an aid memoir or a staff group, simply start typing and a smart list displays to select from.
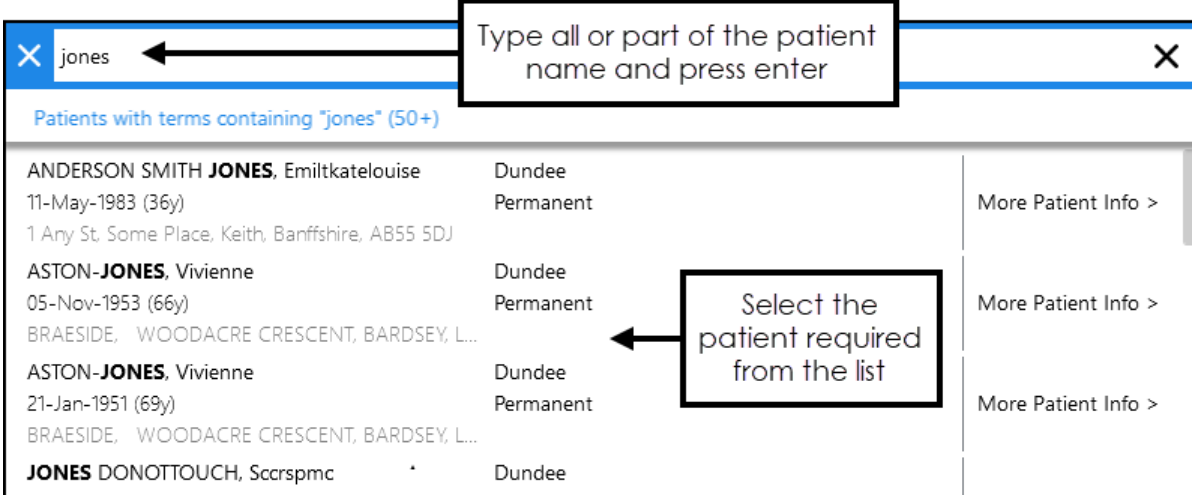

✏️ **Note** - You can select **ALL USERS** to send a task to every member of staff.

- **Subject** - Enter a short description of the task, up to 30 characters, this appears in the **My tasks** list of the recipient.

- **Description** - Enter a full description for the task, up to 1000 characters.

- **Attach patient** (optional) - Select Attach patient to attach a patient:

  - The **Search for patients** screen displays, type the patient name (either in full or part), press return or select **Search** 🔍. A list of matching patients displays, select the patient required. Select **More Patient Info** More Patient Info > for further demographic information:

- **Write back clinical code** (only available if a patient is attached) (optional) - Select a clinical code from the list available to write back to the patient record when the task is completed.

- **Attachments** (optional) - Select **Attach** 📎 Attach to add an attachment to this task, see Adding Attachments for details.

✏️ **Note** - There is a 2MB file limit for attachments.

- **Category** - Select from the pre-defined list, this facilitates the ability of the recipient to filter tasks allocated to them.

- **Due date/Time** - Defaults to today's date. If required, select a date that this task should be completed by, either selecting the **Calendar** 📅 and then a date or enter an offset time frame using the usual d=days, w=weeks, m=months or y=years short hand, for example, 2d = 2 days.

- **This task is sensitive** - Tick to mark a task as sensitive, if selected only the sender, recipients and system supervisors can see the full details of the task.

ℹ️ **Important** - Ensure you do not include sensitive data in the **Subject** line as this may inadvertently be seen by unauthorised staff.

- **Urgent** - Tick if this task should be marked as urgent. If **Make this urgent when overdue** is already selected, this option is not available.

- **Make this urgent when overdue** - Tick if the priority of this task should increase when overdue. If **Urgent** is already selected, this option is not available.

- **All recipients must complete** (optional) - If this task is going to a group of recipients, tick to request they all complete the task as opposed to just one of them.

- **Create another** - Tick to automatically start another new task when you select **Send**.

3. Select **Send** to save and send the task.

4. A '*Task was sent successfully*' message briefly displays at the bottom of your screen.

✏️ **Note** - It is not possible to select a template from within the **New task** screen. If you want to use a Task Template, close **New task**, select **Templates** `Templates ∨` and then select the appropriate template.

Creating a Task from a Template

To facilitate the quick creation of regular tasks, you can use **Task Templates**.

1. From any **Task** screen, select **Templates** Templates ⌄ .

2. A list of templates displays (your template list is determined by the staff groups you are a member of and set up by your system manager).

⊕ New task   Templates ⌄

5 task(s)   Reauthorise Repeat

Search...   Referral letter

Monday morning t...   27-   Home visit
NO PATIENT

Book an appointm...   27-   Book appointment
SREEVALSAN, Angelo (Mr.)

Task for today   27-   Community Referral
TRAN, Tracey (Mrs.)

GP Training   26-Feb-2018 •   More...

Select the template required ⟵
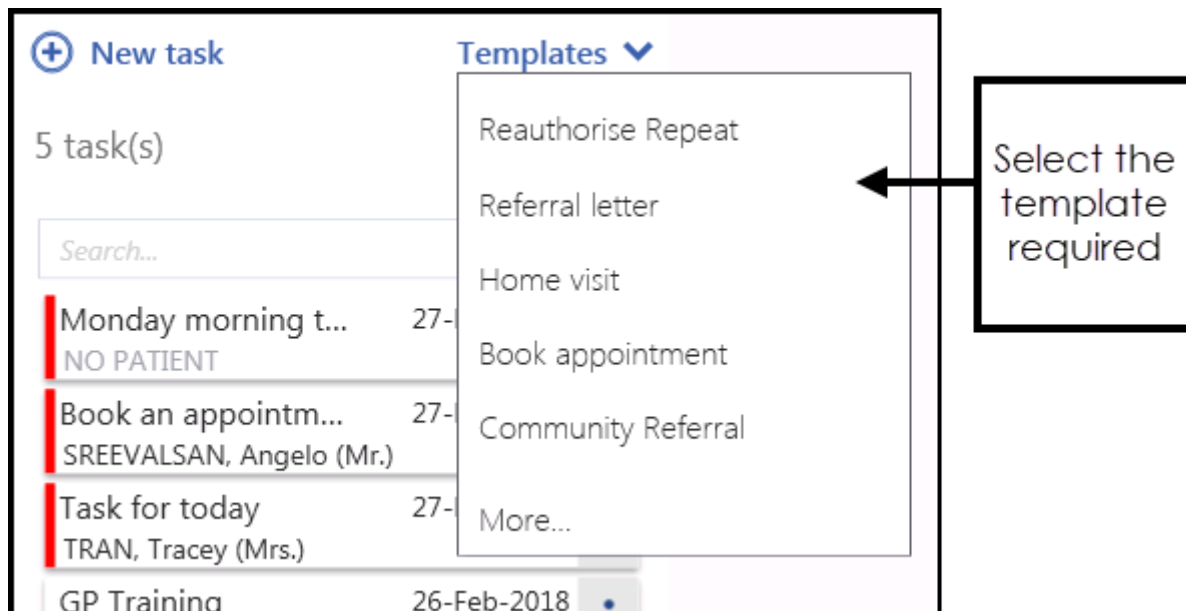
3. Select the template you require and the **New Task** screen displays. Depending on the template selected, different sections of the **New Task** screen are completed, the rest should be completed in the usual way:

New Task

Based on 'Make appointment' template

From Doctors (Edit)

Recipient(s)   *Required*

👥 Secretary ✕   🔍

Subject   *Required*

Make appointment for patient   2

Description

Please make an appointment for this patient

957

Attach patient

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

Attachments

📎 Attach

Category   Due Date/Time ❓   *Required*

🔴 Book Appointment   ✕ ∨   03-Apr-2020   📅

☐ This task is sensitive   ☑ Urgent   ☐ Make urgent when overdue

☐ All recipients must complete

☐ Create another   **Send**   Cancel

Depending on the template selected, different sections complete automatically

Update sections as required and then select **Send**

---

4. Complete as required:

- **From** (optional) - If you are creating this task on behalf of a group of staff you are a member of, select **Edit** and select the appropriate group.

- **Recipient(s)** - Select the recipient of this task, this can be one or more individual members of staff, yourself to act as an aid memoir or a staff group, simply start typing and a smart list displays to select from.

> ✏️ **Note** - You can select **ALL USERS** to send a task to every member of staff.

- **Subject** - Enter a short description of the task, up to 30 characters, this appears in the **My tasks** list of the recipient.

- **Description** - Enter a full description for the task, up to 1000 characters.

- **Attach patient** (optional) - Select **Attach patient**   Attach patient   :
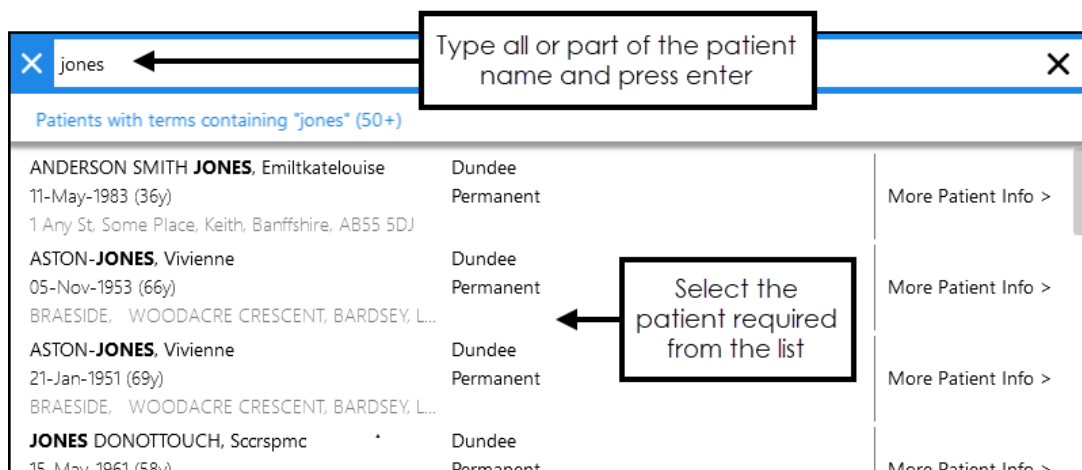
- The **Search for patients** screen displays, type the patient name (either in full or part), press return or select **Search** [🔍]. A list of matching patients displays, select the patient required. Select **More Patient Info** [More Patient Info >] for further demographic information:

- **Write back clinical code** (only available if a patient is attached) (optional) - Select a clinical code from the list available to write back to the patient record when the task is completed.

- **Attachments** (optional) - Select **Attach** [📎 Attach] to add an attachment to this task.

- **Category** - Select from the pre-defined list, this facilitates the ability of the recipient to filter tasks allocated to them.

- **Due Date/Time** - Defaults to today's date. If required, select a date that this task should be completed by, either selecting the **Calendar** [📅] and then a date or enter an offset time frame using the usual d=days, w=weeks, m=months or y=years short hand, for example, 2d = 2 days.

- **This task is sensitive** - Tick to mark a task as sensitive, if selected only the sender, recipients and system supervisors can see the full details of the task.

> ⓘ **Important** - Ensure you do not include sensitive data in the **Subject** line as this may inadvertently be seen by unauthorised staff.

- **Urgent** - Tick if this task should be marked as urgent. If **Make this urgent when overdue** is already selected, this option is not available.

- **Make this urgent when overdue** - Tick if the priority of this task should increase when overdue. If **Urgent** is already selected, this option is not available.

- **All recipients must complete** (optional) - If this task is going to a group of recipients, tick to request they all complete the task as opposed to just one of them.

- **Create another** - Tick to automatically start another new task when you select **Send**.

5. Select **Send** [Send] to save and send the task.

6. If the template selected has **Task should contain an attached patient** ticked and you do not attach a patient, the following warning message displays:

Warning

The following entries are required:
  Attached patient
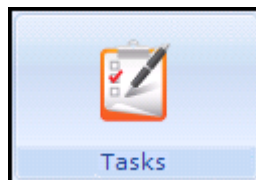
Send task anyway   Show me

7. Select **Send task anyway** to send regardless or **Show me** to select a patient.

8. A '*Task was added successfully*' message briefly displays at the bottom of your screen.

Processing a Task

To process a Task:

1. Open **Tasks** from:

    - The **Vision 3** front screen, select **Tasks** .
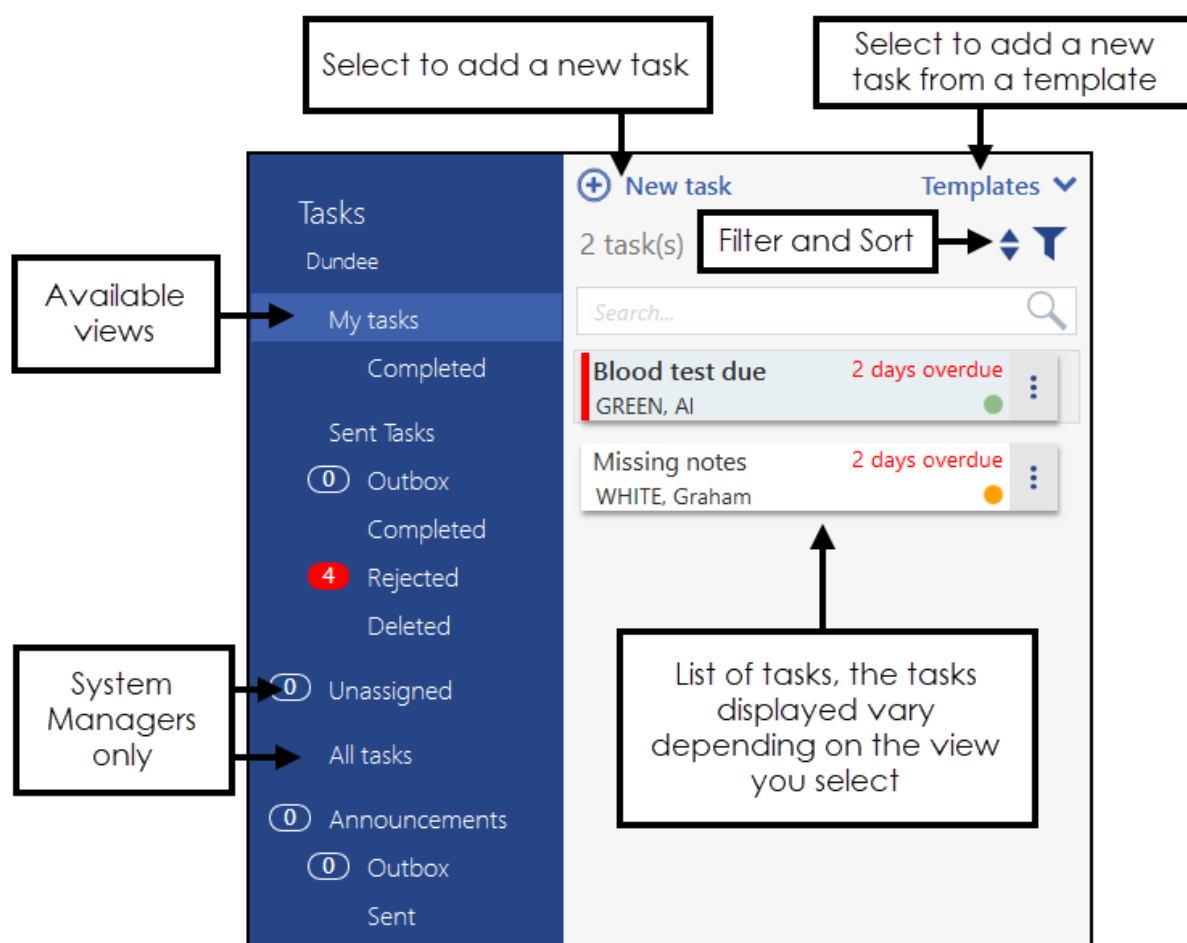
    - From your Windows desktop:

        - **Windows 10** - Select **Start** - Tasks .

        - **Windows 7** - Select **Start** - Tasks .

2. Your **My tasks** screen displays:

Select to add a new task

Select to add a new task from a template

Available views

Filter and Sort

List of tasks, the tasks displayed vary depending on the view you select

System Managers only
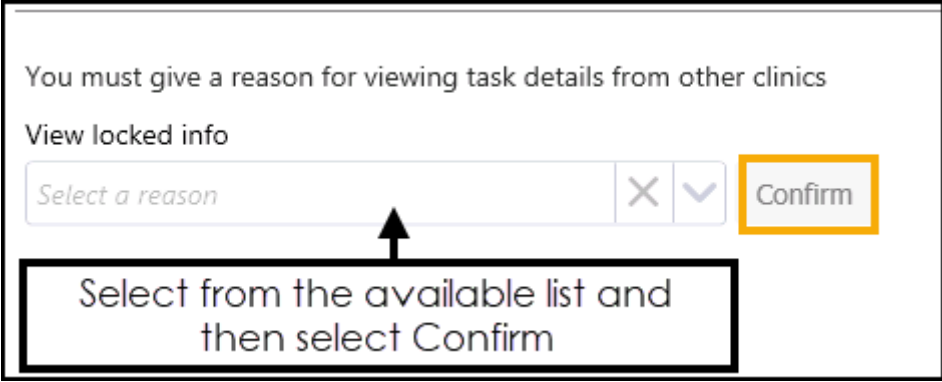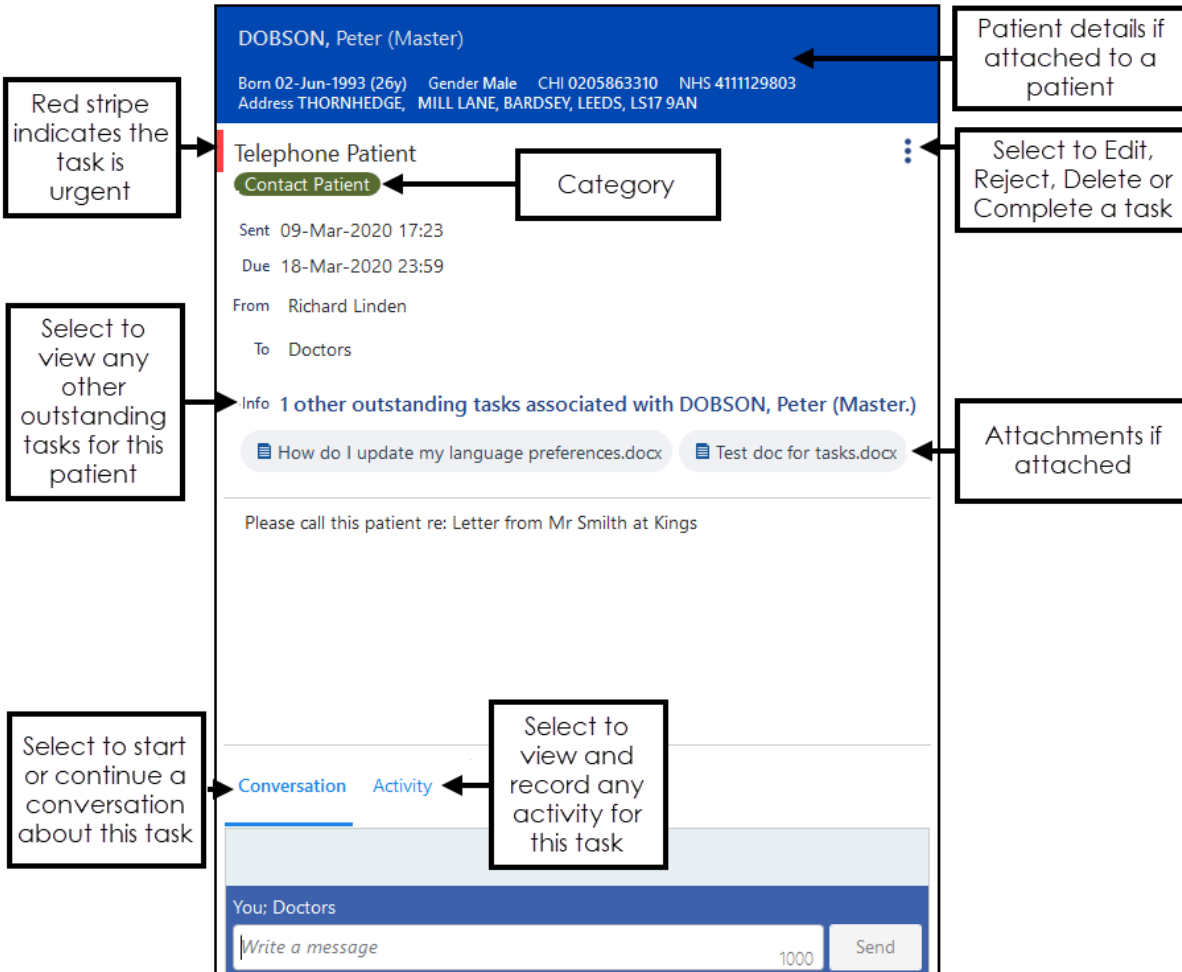
3. Select the task you wish to process and it displays in the right hand pane.

4. If the task is from a third party and has a patient from another practice attached, you must record a legitimate relationship with that patient. A message '*You must give a reason for viewing task details from other clinics*' displays, select from the list available and then select **Confirm**:

You must give a reason for viewing task details from other clinics

View locked info

Select a reason ✕ ⌄ Confirm

Select from the available list and then select Confirm

5. The task now locks to prevent other users from trying to process it at the same time:

Patient details if attached to a patient

DOBSON, Peter (Master)

Born 02-Jun-1993 (26y)   Gender Male   CHI 0205863310   NHS 4111129803
Address THORNHEDGE,   MILL LANE, BARDSEY, LEEDS, LS17 9AN

Red stripe indicates the task is urgent

Telephone Patient

Contact Patient — Category

Select to Edit, Reject, Delete or Complete a task

Sent 09-Mar-2020 17:23

Due 18-Mar-2020 23:59

From   Richard Linden

To   Doctors

Info 1 other outstanding tasks associated with DOBSON, Peter (Master.)

Select to view any other outstanding tasks for this patient

📄 How do I update my language preferences.docx   📄 Test doc for tasks.docx

Attachments if attached

Please call this patient re: Letter from Mr Smith at Kings

Select to start or continue a conversation about this task

Conversation   Activity

Select to view and record any activity for this task

You; Doctors

Write a message   1000   Send

6. Process the task as required:

- **n other outstanding tasks associated with** - Where **n** is the number of other associated tasks, select to list other tasks for this patient .
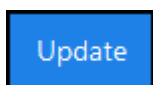
- 002UK010.docx **Attachment** - Select to view any attachments for this task.

- **Options** - Select to :

  - **Edit** - Opens the original task to update or change the details, for example, select another recipient.

  - Select **Update** Update to save any changes. This should not be used to record action taken, see **Activity** below for full details.

  - **Reject** - To return the task to sender without actioning it. A warning screen displays. Select a reason for audit purposes, if you select **Other**, you have the opportunity to add a free text reason for rejection. It is important you do not reject a task in order to respond to it, use the **Conversation** tab. See Conversations for full details. If a task is rejected there is currently no option to resend without recreating it. **Reject** is not available for self assigned tasks.

  - **Delete** - To delete the task without actioning it. A warning screen displays and a reason must be entered for audit purposes. Please be aware, this action can be carried out by both the sender and the recipient.

  - **Complete** - To complete the task, and move it to your **Completed** list.

  Note - For clinical safety reasons, if a patient is attached to a task, you cannot change or remove the patient. If a different patient is required, you need to delete the task and add a new task attached to the correct patient.

- **Conversation** - Select the **Conversation** tab Conversation to send a message to the originator of this task, this works across organisations too. Enter your message and select **Send**. See Conversations for full details.

- **Activity** - Select the **Activity** tab Activity to record activity relating to this task, enter your activity for example 'Called patient, no answer' and select **Update**.

Tasks

Receiving and Allocating Cross Organisational Tasks

Tasks from outside organisations are automatically received into the **Unassigned** mailbox in **Tasks**:
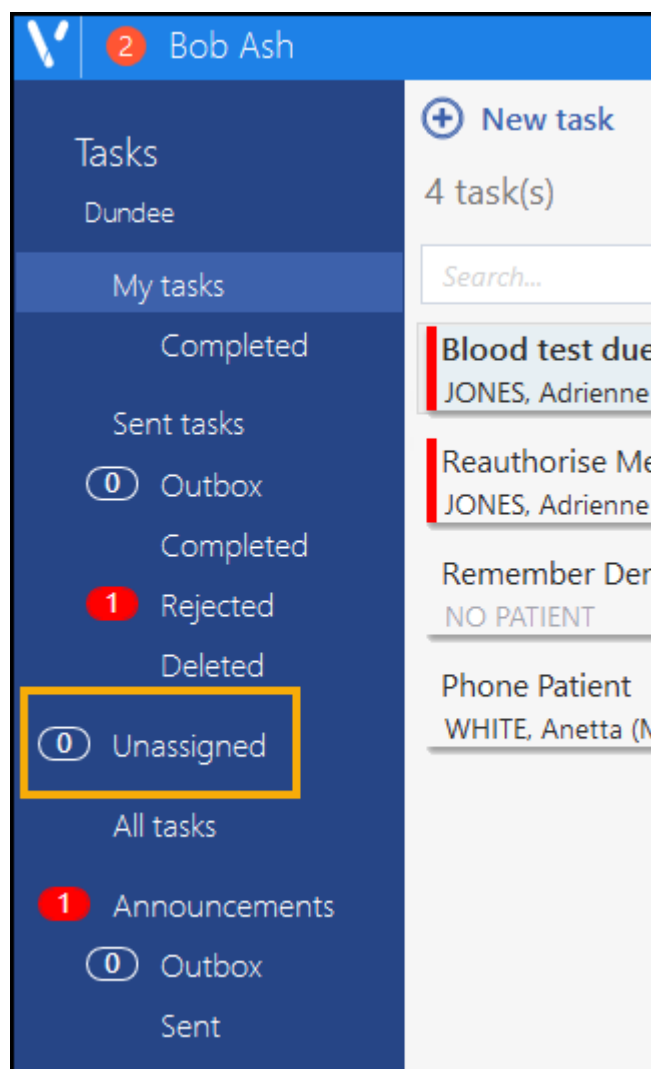
> 🖊 **Note** - The **Unassigned** mail box is only visible to users with System Administrators rights.

To allocate a task received from another organisation:

1. From **Tasks**, select the **Unassigned** mailbox.
2. Select the task to allocate from the middle column, the details of the task display to the right:

- If the task has a patient attached, the patient name displays but not the detail of the task. To view the details, if required for allocation, select a reason for viewing the task details from the available list and select **Confirm**:

You must give a reason for viewing task details from other clinics

View locked info

Select a reason ✕ ∨ Confirm

Select from the available list and then select Confirm

- The task details display if a patient is not attached.

- If you need more details to allocate the task, you can use the **Conversation** facility to ask the originator for more details:

Conversation   Activity

Select Conversation

Enter your query and then select Send

You; Leeds and Dundee Federated Service

Forgot to say, this was arranged with the daughter   950   Send

3. Select **Options** ⋮ and select either:

- **Reject** - To send the task back to the initiating organisation. You can add a reason in **Conversation** to clarify why you are rejecting the task. The task is removed from the **Unassigned** mailbox.

- **Forward** - To select the member of staff within your practice to receive this task.

● Pathology Review   17-Jul-2018 ⋮
NO PATIENT

● Annual Prescribing 17-Jul-2018 Reject
NO PATIENT   Forward

Select to forward to the correct recipient

4. The **Forward Task** screen displays, simply select the name of the staff member or group to receive this task.

5. Then select **Forward** Forward .

Forward Task

Please select a recipient to forward this task to: [m|] 🔍

Jane Mars
Practice User

Mel Earth
Practice User

Micky Neptune
Practice User

Online Patient Messaging
Staff Group (3/3 available)

Conversation   Activity

✎ **Note** - Only one recipient (single staff member or group) can be selected for a cross organisation task.

6. The task is removed from the **Unassigned** mailbox and displays in the recipient's **My tasks** list in the usual way ready for processing.

Logging out of or Shutting down Tasks

It is vital that you understand the difference between 'logging out of' and 'shutting down' Tasks.

- **Shut Down - Recommended** - When you shut down Tasks, using **Shut Down** ✕ you are returned to your previous screen and Tasks closes.

- **Log Out** - When you log out of Tasks, using **Log Out** ⏻ from the bottom left corner of the Tasks screen, this takes you to the **Vision Admin** sign in screen, to log back into Tasks, you need to enter your recorded email and your usual Vision password.

To go back into **Vision**, simply select **Vision - Live System**
[V Vision - Live System] from the toolbar.

Organisational Services

User accounts for **Tasks** in a shared care setting are managed in **Organisational Services** which is part of the **Vision 360 Clinical Portal**.

The link and log in details were provided as part of your **Tasks** go live.

User management:

- Adding a Shared Care User on page 28.
- Resetting a Password for a Shared Care User on page 32.
- Unlocking a Shared Care User's Account on page 34.

Services

- For details on viewing and maintaining data sharing agreements between organisations, see Service Overview

Audit Trail

- For details on viewing user and patient activity, see Tasks Audit and Audit Viewer.
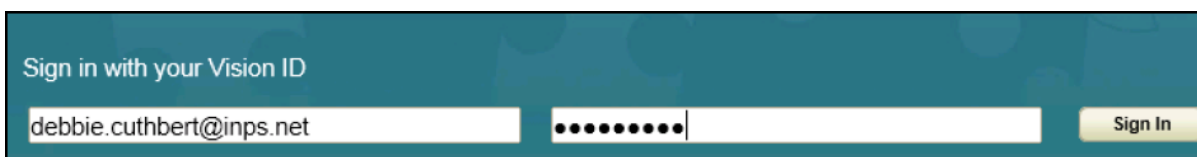
See Organisational Services Help Centre for full details.

Adding a Shared Care User
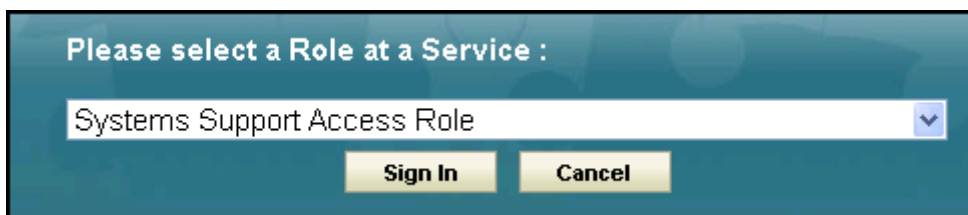
In order to use **Tasks** in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

To create a user in **Organisational Services** and then add them to a service:

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by Vision.

2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and then select **Sign In**.

3. From **Please select a Role at a Service**, select **Systems Support Access Role**:

4. The **Vision 360 Clinical Portal** home screen displays, select

    Organisational Services.

5. The **Service Details** screen displays.

6. Check to see if the user already exists, see Search for a User for details.

    *   If the user exists, you can simply add the service required, see Add a User to a Service on page 31.

    *   If the user does not exist, they must be added, see Create a User in Organisational Services on page 29.
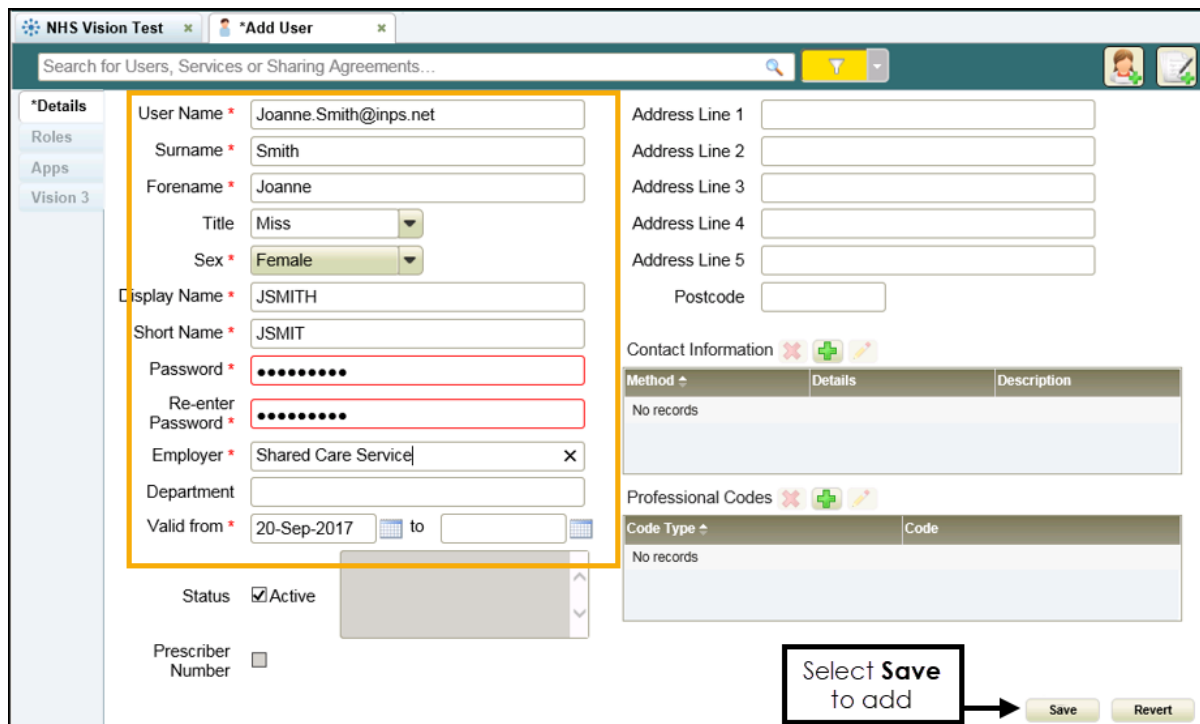
Now complete the following as required:

Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to, see Search for Service for details.

2. Select **Create User** and the new **Add User** tab displays:
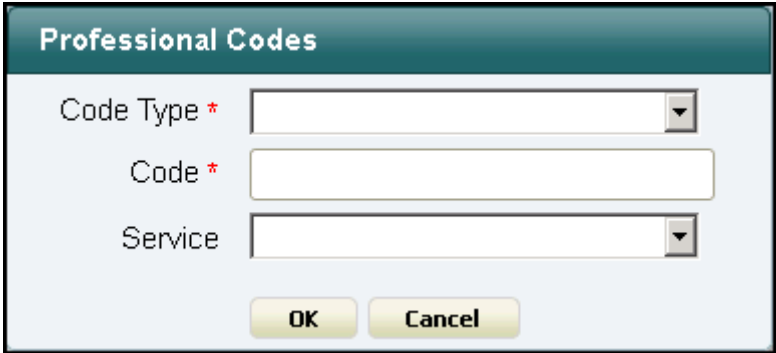
3. Enter the new users details, items marked ***** are mandatory fields.

    -   The password must be a minimum of 6 characters and contain characters from at least three of the following categories:

        -   Upper case

        -   Lower case

        -   Numbers

        -   Non-alphanumeric characters: ~!@#$%^*_-+=`|\(){}[]:;'.?/

        -   No spaces at the beginning or end of the password

        -   The password must not contain three or more consecutive characters (case insensitive) from the user name, forename or surname.

4. For clinicians we recommend you add any relevant Professional Codes, for example a GMC code.

Adding a Professional Codes
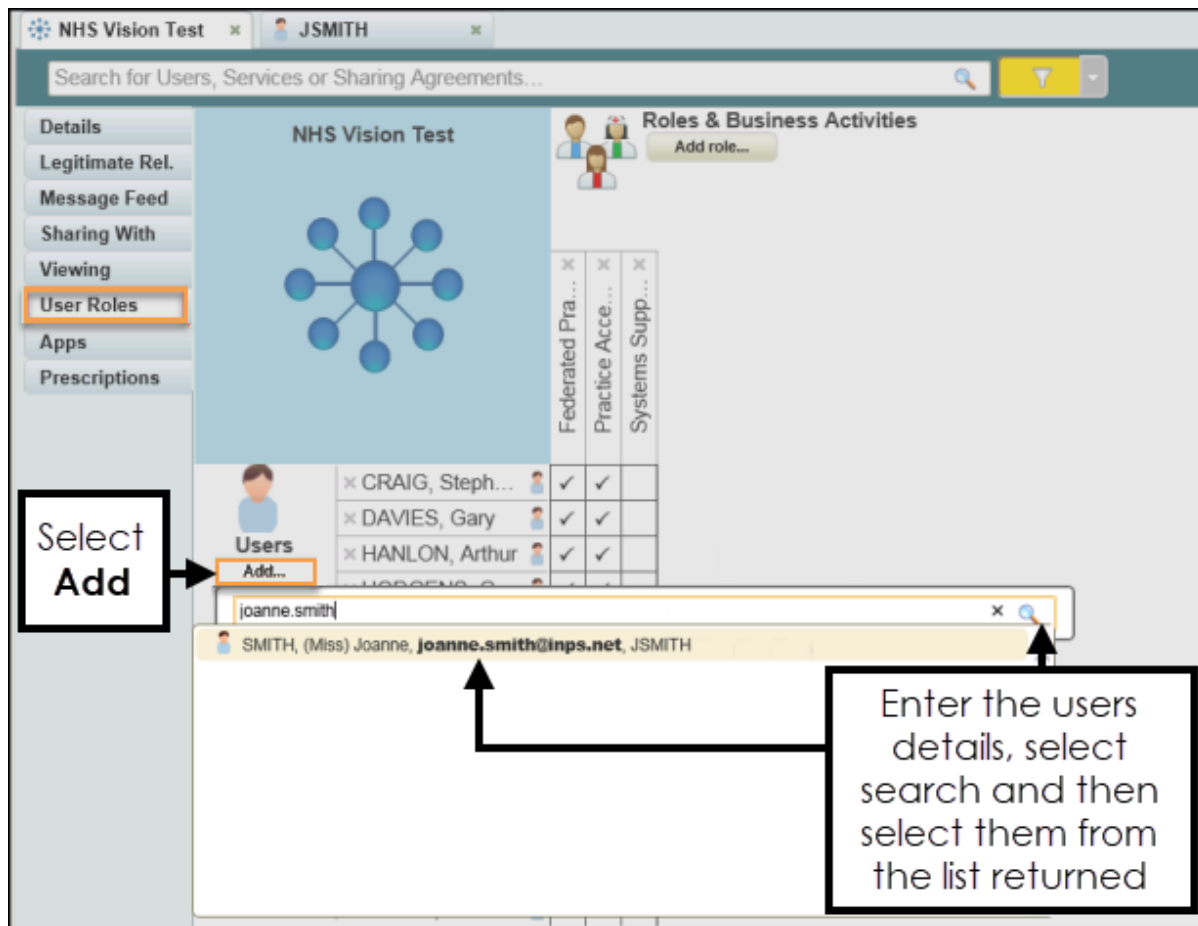
a) From **Professional Codes**, select **Add** .

b) The **Professional Codes** screen displays:

c) Complete as required:

- **Code Type** - Select the type of code to record
- **Code** - Enter the code
- **Service** - Select from the list of services available for this user.

d) Select **OK**.

5. Select **Save** .

Add a User to a Service

1. Open the **Shared Care Service** view, if you have just created the user, this is still open at the top of your screen.

2. Select **User Roles**:

3. Select **Users Add...**.

4. Enter user's details in the search bar, and select **Search**.

5. Select the user from the results.

6. The user is assigned to the shared care service.

7. Tick next to the user's name under the appropriate heading, to allocate their role.

✏️ **Note** - To remove rights from a user, simply untick the box.

Resetting a Password for a Shared Care User

To reset a password for a shared care user:

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by **Cegedim Healthcare Solutions**.

2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**:

3. Select your **Systems Support Access Role**:

4. Select **Organisational Services** .

5. In the search box, type part of the locked user's name or email and select **Search** .

6. All matching results display, select the user required.

7. The **Edit User** screen displays with the **Details** tab selected.

8. In **Password**, enter a new password.

9. In **Re-enter Password** enter the new password again to confirm:

User Details Screen

10. Select **Save**.

    Please Note - The following password validation rules apply when resetting a user's password:

    - Minimum of 6 Characters
    - Contain Upper and Lower case Letters
    - Contain Numbers
    - Contain Non-alphanumeric symbols (for example & $ % etc)
    - Password from the last 5 passwords cannot be used

    See Organisational Services Help Centre for full details.
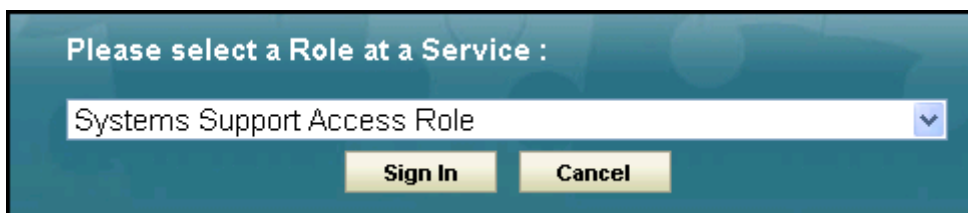
Unlocking a Shared Care User's Account

After three unsuccessful attempts at logging in, users are locked out of Vision Anywhere and the locked out message displays:
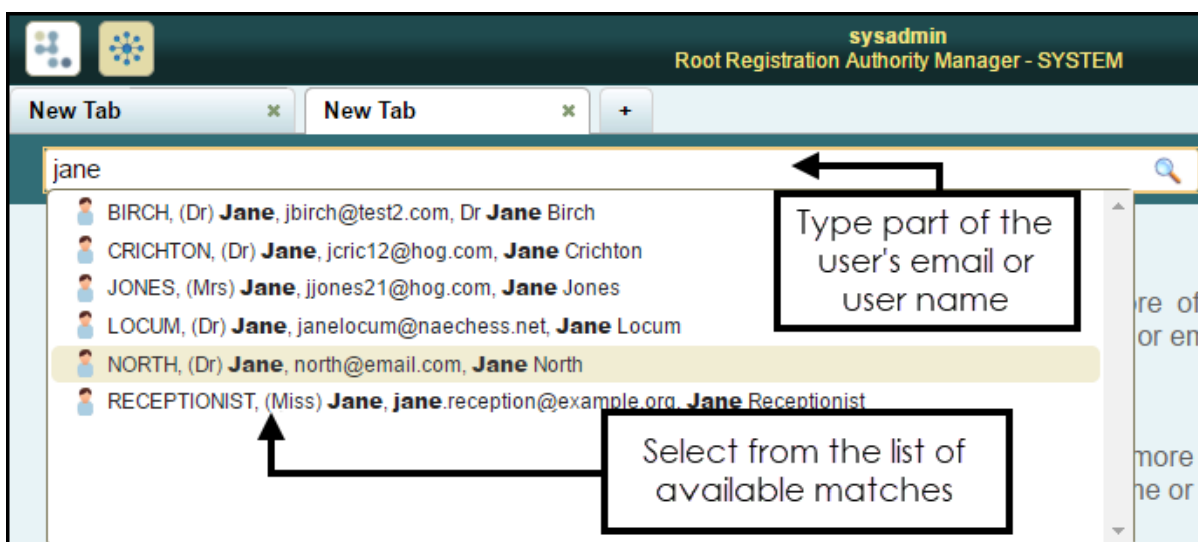
To unlock a shared care user's account:

1. Open your browser and access the **Vision V360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.

2. Login to the **Clinical Portal Vision 360** by entering your user name and password and select **Sign In**:
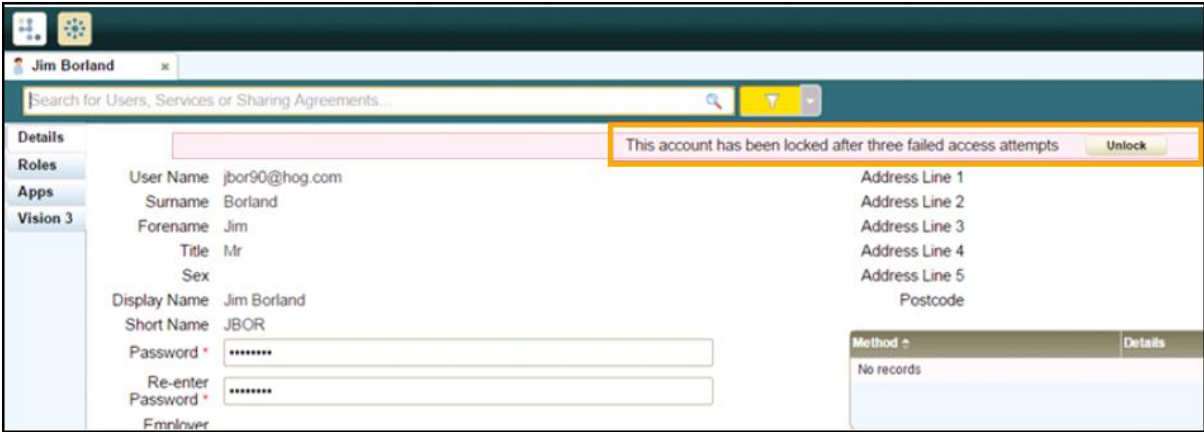

3. Select your **Systems Support Access Role**:

4. Select **Organisational Services** .

5. In the search box, type part of the locked user's name or email and select **Search** :

6. All matching results display, select the user required.

7. The **Edit User** screen displays with the **Details** tab selected.

8. The **This account has been locked after three failed access attempts** message displays at the top of the **Details** screen:

9. Select **Unlock** .