Tasks

Tasks Quick Start Guide

Viewing Tasks

A notification alert either displays on your toolbar if **Tasks** is open but minimised , or as a notification count on your user profile 

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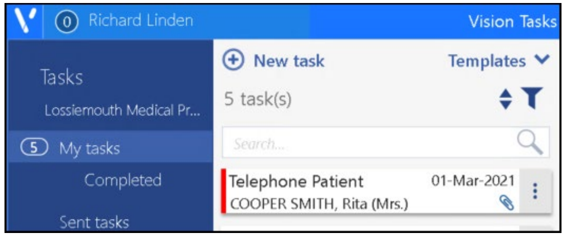
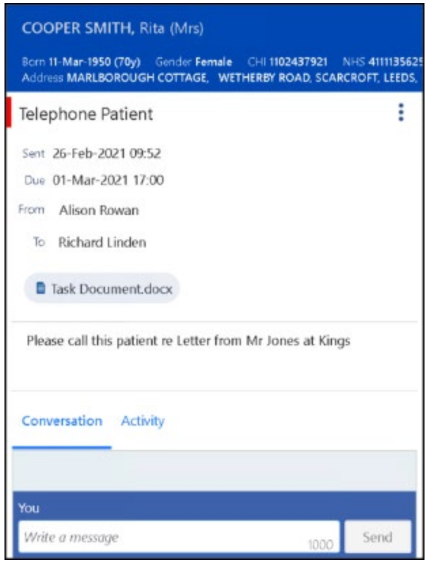
Logging into **Tasks** displays with **My Tasks** selected:



All outstanding tasks display, select an individual task to display the details in the right hand pane. The task locks to prevent other users from processing it.

Select **Unassigned Tasks** to view tasks from outside your practice.

Processing a Task



The task screen displays the following information:

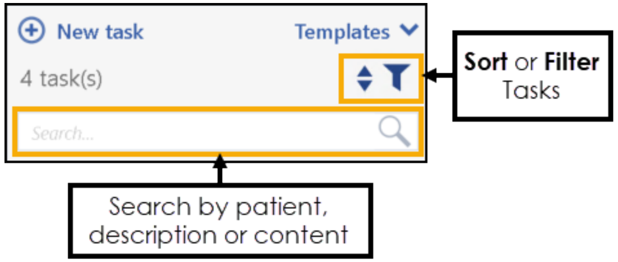
- **Patient details**
- **Category**
- **Additional outstanding tasks for this patient**
- **Conversation** – to send a message to the originator.
- **Activity** – recording activities relating to this task, for example 'Called patient, no answer'.

Select **Options**  to:

- **Edit** – update or change details.
- **Reject** – return without actioning (with reason).
- **Delete** – delete task without actioning (with reason).
- **Complete** – move task to your completed list.

Searching for Tasks

You can search for a task by patient, description or content. You can also filter and sort the tasks list as required:



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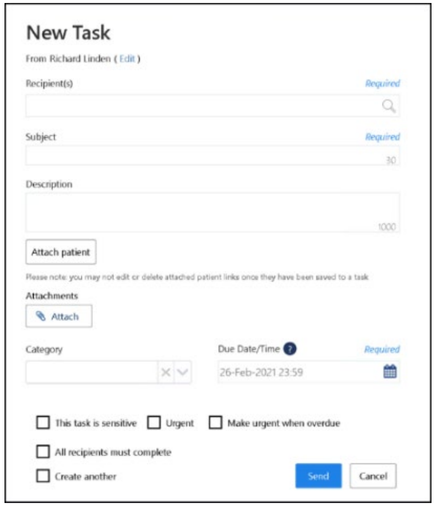
Creating a Task

Select **New task** [New task] to create a new task:

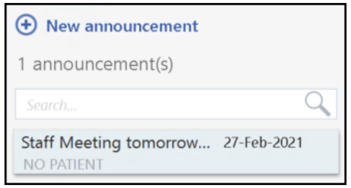


Complete as follows:

- **Recipient(s)** – Start typing to add a recipient or a group of recipients, for example, **ALL USERS**. This can be from your practice or from another organisation.
- **Subject** – Short description of task, max 30 characters.
- **Description** – Full task description, max 1000 characters.
- **Attach patient** (optional).
- **Write back clinical code** (optional) – Select a code to write back to the patient record on completion.
- **Attachments** (optional) – Select from the patient selected or from your system.
- **Category** – Select from the available list.
- **Due Date/Time** – Defaults to today's date, select from the calendar or enter an offset timeframe, for example 2d is 2 days.
- Tick as appropriate:
  - **This task is sensitive**
  - **Urgent**
  - **Make urgent when overdue**
  - **All recipients must complete**
  - **Create another** – Automatically start a new task when you select **Send**.

Announcements

Announcements do not need processing they are for information purposes only:



Select **Announcements** to view any announcements.

Settings

Select **Out of office** to set a date range and to assign a colleague to forward tasks to.

System Managers Only

Select **Unassigned** from the menu to view and allocate tasks from outside your practice.

Select **All tasks** to view all practice tasks.

Select **Settings** - **Task Templates** to create or edit a task template.

For full details see http://help.visionhealth.co.uk/tasks_help_centre/Content/Home.htm.