Tasks Quick Start Guide
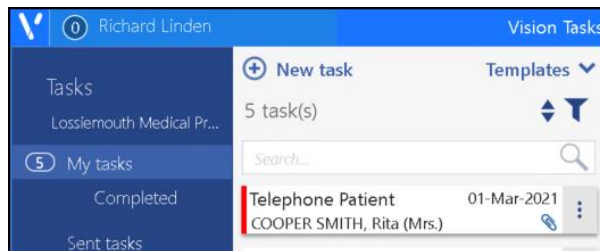
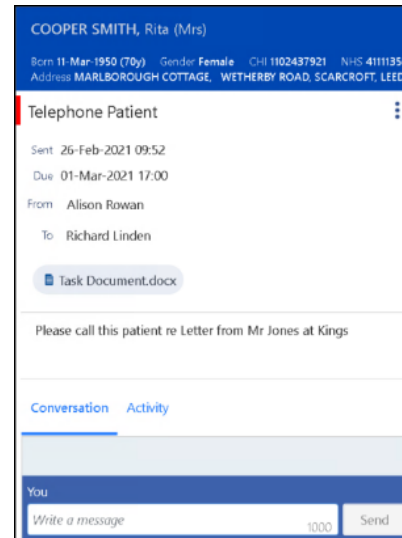## Viewing Tasks

A notification alert displays:

- On your toolbar if **Tasks** is open but minimised ,
- As a notification count on your user profile and
- Within the **Tasks** pane on the **Vision 3** front screen.

When you log into **Tasks, My Tasks** displays:

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

## Processing a Task

The task screen displays the following:

- **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).
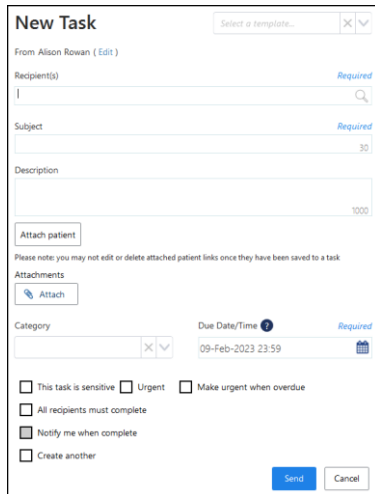- **Complete** – move task to your completed list.

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:
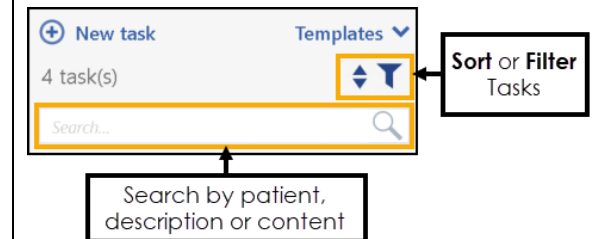
Creating a Task

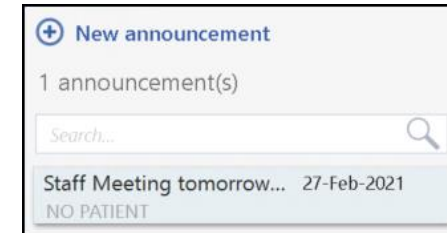Select **New task** ⊕ New task to create a new task:

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**, or

  - **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

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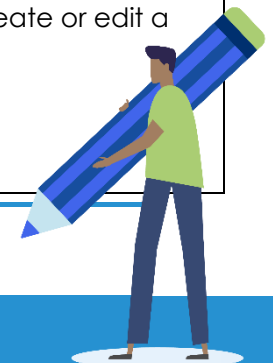
For full details see http://help.visionhealth.co.uk/tasks_help_centre/Content/Home.htm.