



# Tasks v1.4

Comparing the old Daybook to the new Tasks app

# Comparing the old to the new

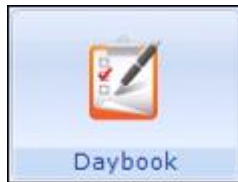
## Accessing Tasks

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### Daybook

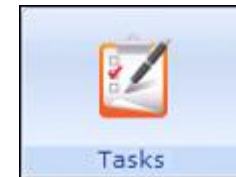
Select either:

- **Daybook** from the Vision front screen



### Tasks

Select **Tasks** from the Vision front screen:



Or

- Select a task from My Daybook Tasks pane:



# Comparing the old to the new

## Notification of Tasks

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### Daybook

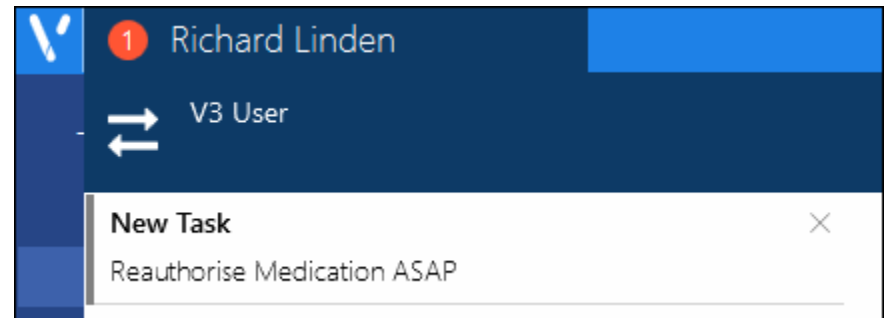
Relies on you spotting new tasks from the Vision front screen or by opening Daybook.

### Tasks

Once **Tasks** is open, Notifications are displayed on the user profile button:



A single click on the user profile button and Notifications are displayed and can be selected:



# Comparing the old to the new Main Task Screen

## Daybook

Select the task you want to view:

The screenshot shows the 'Vision Daybook' application window. It features a navigation bar with 'Home', 'Maintenance', 'Launch', and 'View'. Below this is a toolbar with icons for 'Task', 'Task for me', 'Announcement', 'Task', and 'Action'. A central table displays a list of tasks with columns for Status, Description, Due Date, Assigned To, Issued By, Issued On, Last Actioned On, and Patient. Below the table are sections for 'Properties', 'Announcements', and 'Notifications'.

Status	Description	Due Date	Assigned To	Issued By	Issued On	Last Actioned On	Patient
📞	phone to bring in re ta...	25/05/2016	System Supervisor	System Supervisor	25/05/2016 09...	25/05/2016 09:47	Karen Dale
📞	Contact details check...	24/05/2016	System Supervisor	System Supervisor	24/05/2016 11...		Alice Smith
📞	Send Yellow Card	25/04/2016	System Supervisor	System Supervisor	25/04/2016 11...		Claire Smith
📞	Call Mr Jones at Kings	22/06/2016	System Supervisor	System Supervisor	22/06/2016 10...		Stacey Babbage

## Tasks

Select the task you want to view:

The screenshot shows the 'Tasks' interface for 'Dundee'. It features a 'New task' button and a 'Templates' dropdown. A search bar is present. The main area displays a list of tasks with status indicators (e.g., 'Completed', 'Assigned tasks', 'Rejected', 'Deleted', 'Unassigned', 'All tasks', 'Announcements', 'Outbox', 'Sent'). The task list includes details like 'Phone Patient', 'Blood test due', 'Reauthorise Medi...', and 'Remember Dentist!' with overdue indicators.

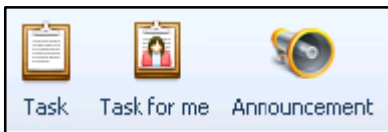
Task	Status	Overdue
Phone Patient WHITE, Anetta (Ms.)	Completed	2 wks overdue
Blood test due JONES, Adrienne	Assigned tasks	2 wks overdue
Reauthorise Medi... JONES, Adrienne	Rejected	2 wks overdue
Remember Dentist! NO PATIENT	Deleted	2 days overdue
Reauthorise Medi... WHITE, Anetta (Ms.)	Unassigned	09-Mar-2019

# Comparing the old to the new

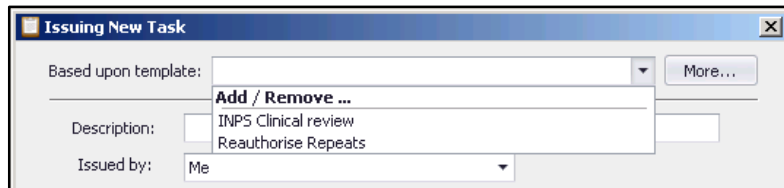
## Creating a Task

### Daybook

Select the type of task you want to create:



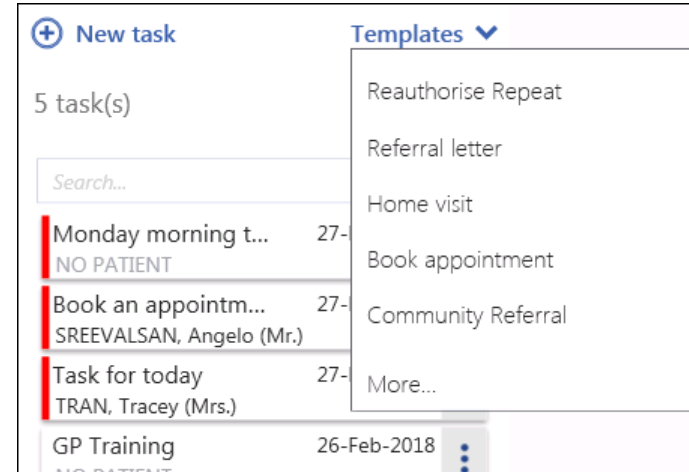
To select a Template, choose from the list or



### Tasks

Select **New task**  to create any type of task.

Select **Templates**  to select from your template quick list:



# Comparing the old to the new

## Populating a Task

**Issuing New Task**

Based upon template:  [More...](#)

Description:

Issued by:  [Change Patient...](#)

Attached to patient: [Alice Smith](#)

On completion, add to medical history

Attached to document

Notify me, when task is complete

Due:  at:  :

Priority:  Urgent  No priority escalation  
 Routine  Escalate priority, if not completed by:   
 Low

To:  [Choose...](#)

Comments:

**New Task**

From Bob Ash ([Edit](#))

Recipient(s) \*

[x](#)

Subject \*

Description

936

Attached patient

[x](#)  
14-May-1970 (48y) - 1405805005

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

Write back clinical code

[x](#)

Category

[x](#)

Due Date/Time ?

This task is sensitive  Urgent  Make urgent when overdue

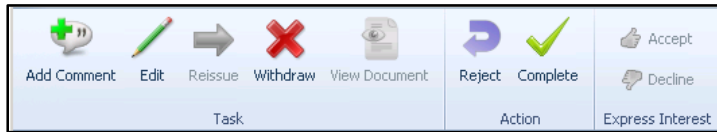
Create another

# Comparing the old to the new


## Processing a Task

### Daybook

Select the task you want to process:



### Tasks

Select  to edit, reject, delete or complete the selected task:



Or, use **Conversation** to send a message to the task originator and/or **Activity** to record action taken:

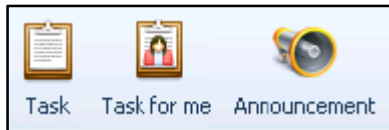


# Comparing the old to the new

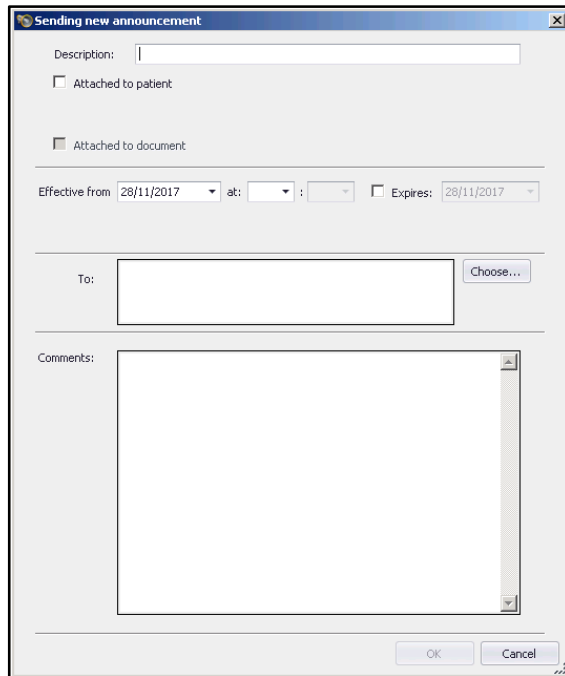
## Creating an Announcement

### Daybook

Select Announcement from the toolbar:




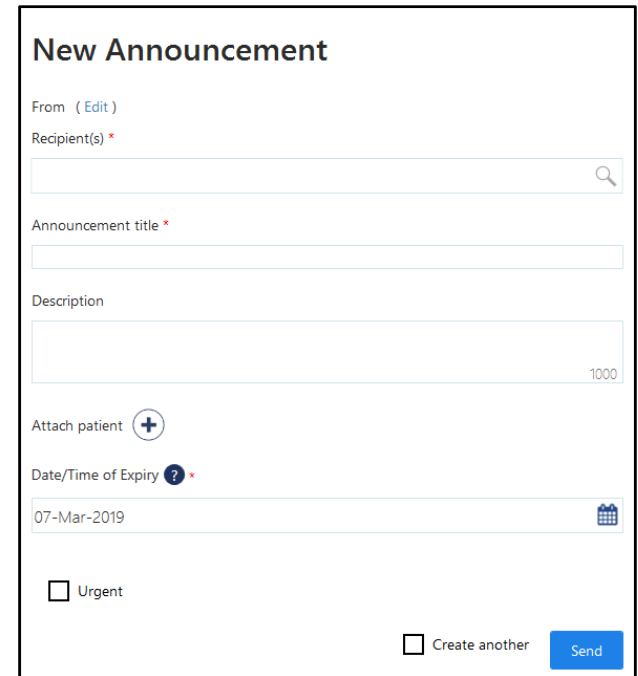
And complete as required:

A screenshot of a dialog box titled 'Sending new announcement'. It contains a 'Description' field, two checkboxes for 'Attached to patient' and 'Attached to document', and date/time pickers for 'Effective from' and 'Expires'. There is a 'To:' field with a 'Choose...' button and a large 'Comments:' text area. 'OK' and 'Cancel' buttons are at the bottom.

### Tasks

From the Announcement screen, select

**New announcement**  and complete as required:

A screenshot of a 'New Announcement' form. It includes a 'From' field with '( Edit )' next to it, a 'Recipient(s) \*' field with a search icon, an 'Announcement title \*' field, and a 'Description' field with a '1000' character count. There is an 'Attach patient +' button, a 'Date/Time of Expiry ? \*' field with a calendar icon and the value '07-Mar-2019', and an 'Urgent' checkbox. At the bottom right, there is a 'Create another' checkbox and a blue 'Send' button.



# Comparing the old to the new

## Notification of Announcements

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### Daybook

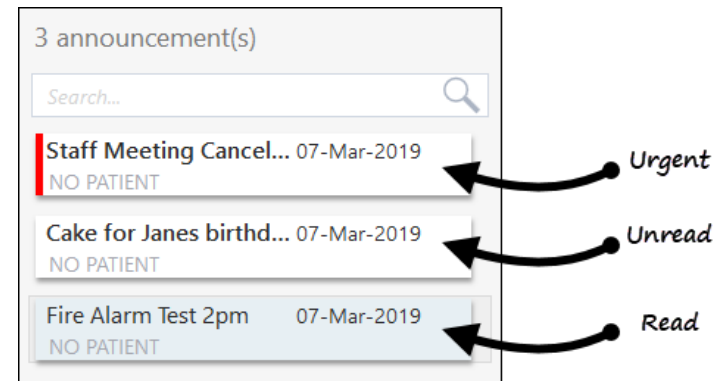
Relies on you spotting new announcements within the Announcements pane of the Vision front screen or by opening Daybook itself.

### Tasks

When a new announcement is received the announcement count on your Task screen increases by one. If there are any unread announcements the count badge is displayed in red:



An unread Announcement has its title in bold. Once viewed, its title automatically reverts to normal text.

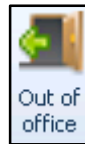


# Comparing the old to the new

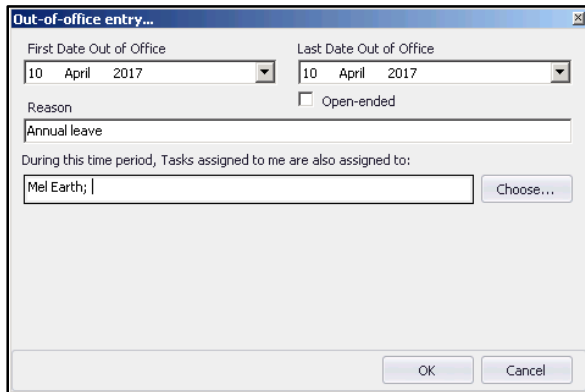
## Adding an Out of Office notification

### Daybook

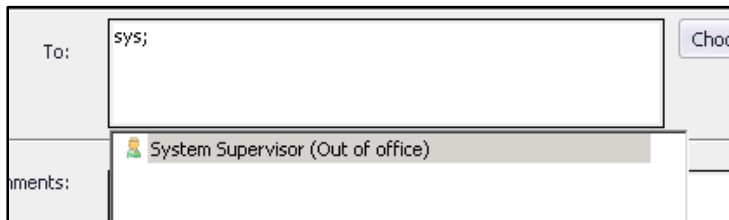
Select **Maintenance – Out of Office**



Select **Add** and complete:

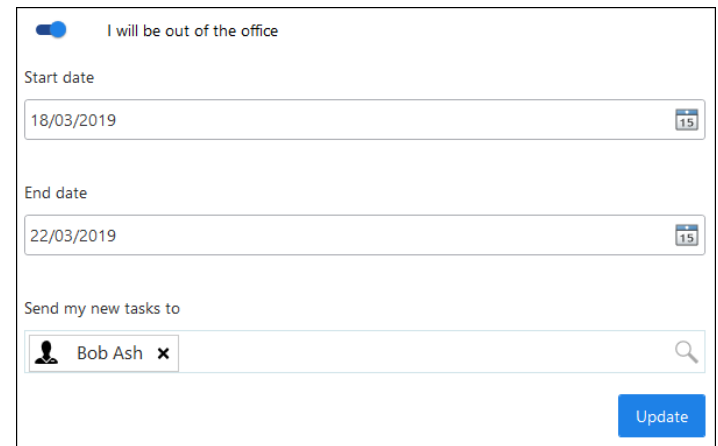
A screenshot of a dialog box titled "Out-of-office entry...". It has two date pickers: "First Date Out of Office" (10 April 2017) and "Last Date Out of Office" (10 April 2017). There is a "Reason" field with "Annual leave" entered. A checkbox for "Open-ended" is unchecked. Below, it says "During this time period, Tasks assigned to me are also assigned to:" followed by a text field containing "Mel Earth;" and a "Choose..." button. At the bottom are "OK" and "Cancel" buttons.

When you select a recipient with an out of office set:

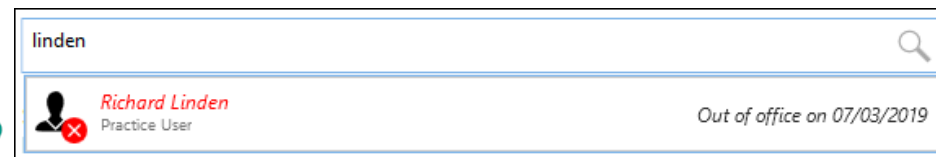
A screenshot of an email recipient list. The "To:" field contains "sys;". Below it, a recipient is listed: "System Supervisor (Out of office)".

### Tasks

Select **Settings**  and then **Out of Office** and complete:

A screenshot of a settings form. At the top, a toggle switch is turned on, labeled "I will be out of the office". Below are two date pickers: "Start date" (18/03/2019) and "End date" (22/03/2019). Under "Send my new tasks to", there is a search field containing "Bob Ash" with a search icon and a close button. An "Update" button is at the bottom right.

When you select a recipient with an out of office set:

A screenshot of a search results box. The search term is "linden". The results show a user profile for "Richard Linden" (Practice User) with a red 'X' icon. To the right, it says "Out of office on 07/03/2019".