



Getting Ready for Tasks for those New to Electronic Task Management

Version 2

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Getting Ready for Tasks for those new to Electronic Task Management

Introduction

Our new Tasks app provides an easy to use task management system for your practice. The first release of Tasks is specifically designed to help everyone in your practice create, keep track of and process tasks and to-do lists quickly and easily.

We are proud of Tasks and are currently working to bring you even more new features. Future releases will bring all of your clinical messages into Tasks, providing a single app to manage all the tasks your practice needs to process on a day by day basis.

What do I need to do?

The following should be considered **before** you migrate to Tasks:

- **Training** - Complete the [eLearning](#) and/or use this help centre to find out all you need to know about using the Tasks app.
- **It is vital you review all your outstanding tasks in Daybook** - Even if you do not use Daybook for workflow purposes, Vision creates tasks automatically and these should be completed, to ensure only those tasks that require actioning are migrated. See [Actioning and Completing Tasks](#) for details.
- **Check security rights** - By default all staff have access to Tasks, however, only staff with system manager rights in Vision 3 can:
 - Create and maintain templates.
 - View **All tasks** including sensitive tasks.
 - Allocate tasks received from other organisations.

See [Security - Add User to Security Group](#) on page 14 for instructions on how to manage Vision 3 security rights.

- **Set up Role Based Access Cards (RBAC) (England only)** - You need to ensure all staff that may need to use Tasks have RBAC activity **B0093 Create Work Item** on their Smartcard. Please contact the relevant person at your Registration Authority (RA) who can help with this.
- **Review staff email addresses** - Review, and where necessary add, valid email addresses for your staff in Vision 3 to enable them to log in to Tasks. See [Managing Staff Email Addresses](#) on page 9 for details.
- **Review existing staff Groups** - Review, update and, where necessary, create Staff Groups to enable the most effective allocation of Tasks and the set up of Template quick lists. See for [Managing Staff Groups](#) on page 12 details.
- **Plan your Templates** - Many tasks have certain things in common, for example, Make an urgent appointment always has a patient attached, always has an Urgent priority, and may always be assigned to the same staff group. You can, therefore, create Task Templates for selection when creating a task to speed up and standardise the entry of more common tasks. It would be a good idea to think about what templates your practice might need before you start using Tasks.

Training

We are providing the following resources to ensure you can get the best out of our new Tasks app.

eLearning

While Tasks is intuitive and easy to use, for you to get the most out of the experience, we recommend that you spend a little time going through the Tasks eLearning modules. This short interactive course walks you through the different screens and how to undertake your day to day tasks. You'll even get a certificate at the end!

Benefits of eLearning include:

- Free training saving your practice £££s
- You can learn at your own pace
- Training can be taken anytime and anywhere - even at home!
- Less disruption - no travelling, significantly less time taken from important practice work

[Click here to register for the free Tasks eLearning. We will send you a link within 24 hours and you will be an expert within half an hour.](#)

[If you already have an eLearning account click here to access the Vision eLearning Hub](#)

Tasks Help Centre

We have also created a full Tasks Help Centre to assist you in utilising Task in the best way for your practice and staff. This contains short video tutorials, a frequently asked questions section, a quick and powerful search facility as well as quick start screens. The Tasks Help Centre is available from http://help.visionhealth.co.uk/tasks_help_centre/1.4/Content/Home.htm.

Managing Security Rights

There are certain aspects of Tasks that can only be carried out by system managers for example, creating Templates.

To add a user to a security group:

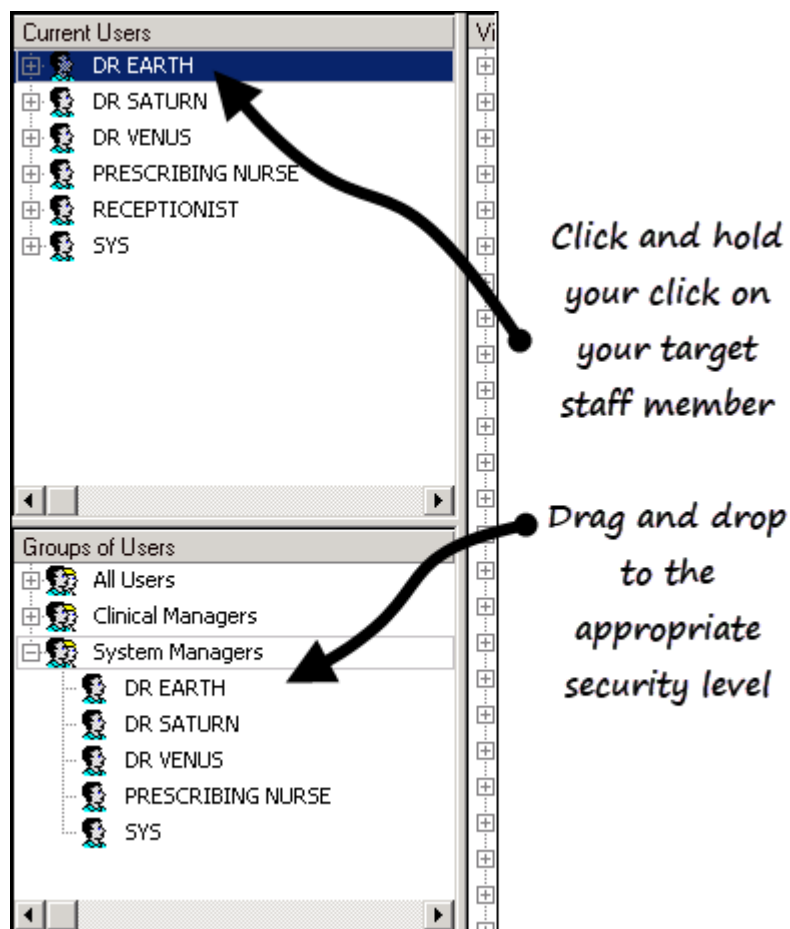
1. From the Vision 3 front screen, select **Management Tools - Control Panel**



- **Security.**

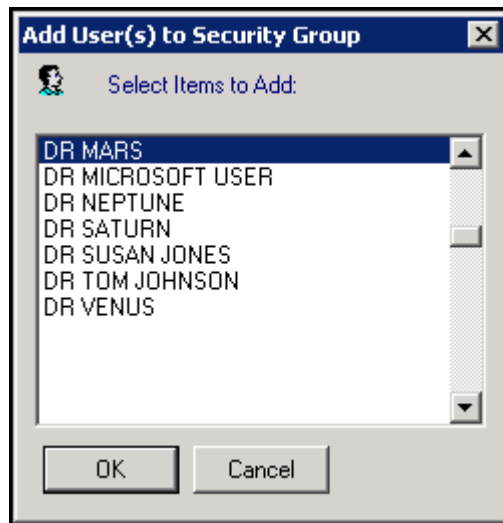
2. Next either:

- Select the user in the **Current Users** list and holding the left mouse down, drag them to the bottom left pane and drop them in the group you want.



Or

- Highlight one of the group headings in the bottom left pane, for example **Clinical Managers**, or **System Managers**, right click and select **Add User(s) to Group**. Highlight the staff member to be added to the Group and select **OK**.



For full information about Staff Groups in Vision 3, please see Vision on-screen Help.

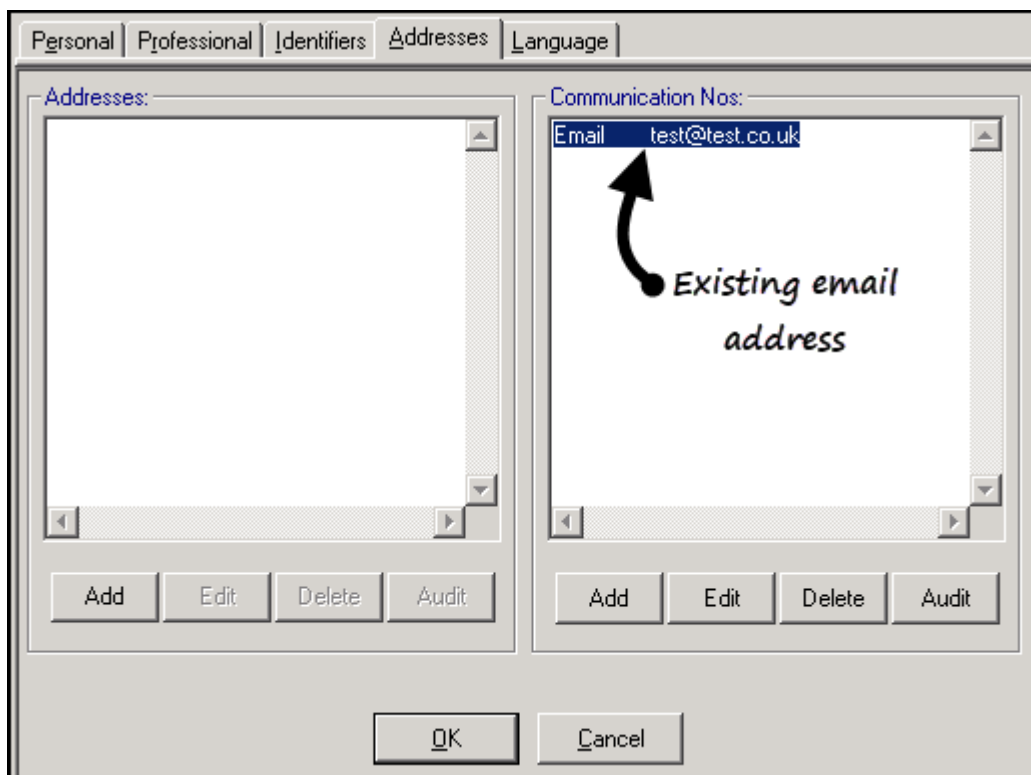
Managing Staff Email Addresses

The recording of main address details for your staff is optional, however a valid email address must be recorded for your staff to access Tasks.

To check an email address:



1. From **Control Panel**, select **File Maintenance - Staff**.
2. Select the member of staff required and then select **Edit**.
3. Select the **Addresses** tab, any recorded email addresses display in the **Communication Nos** pane.



To add an email address



1. From **Control Panel**, select **File Maintenance - Staff**.



2. Select the member of staff required and select **Edit**.

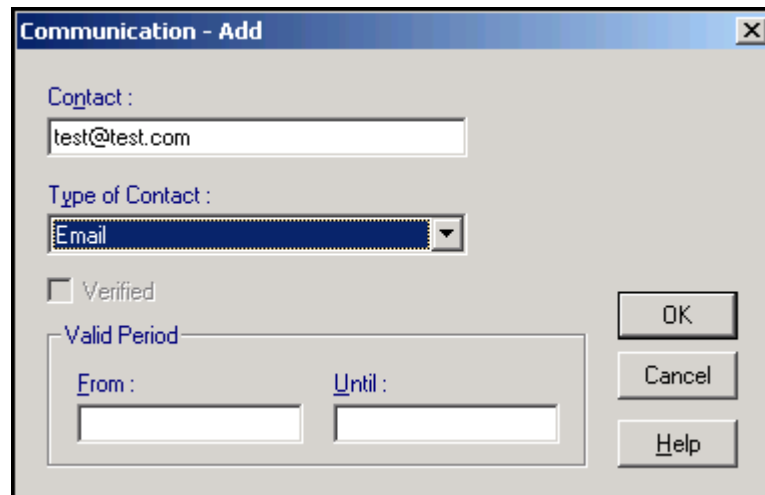
3. Select the **Addresses** tab.

4. From the **Communication Nos** section, select **Add**.

5. The **Communication - Add** screen displays.

6. Complete as follows:

- **Contact** - Enter the email address required
- **Type of Contact** - Select **Email**.



Communication - Add

Contact :
test@test.com

Type of Contact :
Email

Verified

Valid Period

From : Until :
[] []

OK
Cancel
Help

7. Now click **OK** to save and close.

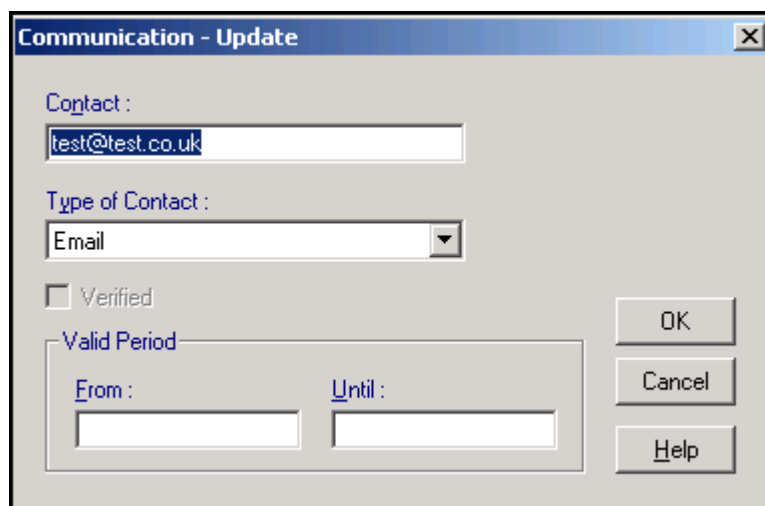
To update an existing email address



1. From **Control Panel**, select **File Maintenance - Staff**.



2. Select the member of staff required and select **Edit**.
3. Select the **Addresses** tab.
4. From the **Communication Nos** section, highlight the email to update and select **Edit**.
5. The **Communication - Update** screen displays:



6. Update the email address as required.
7. Click **OK** to save and close.

Managing Staff Groups

Staff Groups are practice defined groups of staff that are selected from various Vision modules, for instance, a group of Receptionists, GPs, or Health Visitors.

Staff groups are set up and maintained from **Vision 3 - Control Panel**



- File Maintenance - Staff Groups.

On selection of the **Staff Groups** tab, two folders display:

- **Practice** – Allows you to create your own defined staff groups, for example Reception Staff, GPs, Admin.
- **System** - **System groups** are used for allocating **Frequent** staff in **Mail Manager** but are not used in **Tasks**.



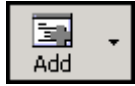
To display all the members of a group:

1. Select **+** beside the **Practice** folder to display existing groups.
2. Select **+** beside either **Mail Groups** or **Frequent Staff**.
3. Now select a group to display all the members of that group.

Adding a new staff group

You may decide to create groups specifically for the management of task templates. This can help ensure that the most commonly used task templates are offered to your staff in the most appropriate way. For example, you could set up **Tasks - GPs, Tasks - Reception, Tasks - Administrators** etc.

1. From **Vision 3 - Control Panel - File Maintenance - Staff Groups**, simply



-
2. select the down arrow on **Add** and complete **Staff Group - Add** as appropriate.

To add or remove staff to a group

1. From **Vision 3 - Control Panel - File Maintenance - Staff Groups**, select a group name in the left hand pane and the top right pane shows all the active staff in the selected group.
2. The bottom right pane contains a list of **All Staff**, simply drag and drop staff to either add to (drag from bottom to top) or remove from (drag from top to bottom) a group.

Security - Add User to Security Group

Note - You are advised to have more than one system manager, to take account of absences, and at least one should be on the premises to unlock any user who forgets the password.

To add a user to a security group:

From the Vision 3 front screen, select **Management Tools - Control Panel**



- **Security**, and either:

- Select the user in the **Current Users** list and drag them to the bottom left pane and drop them in the group you require.

Or

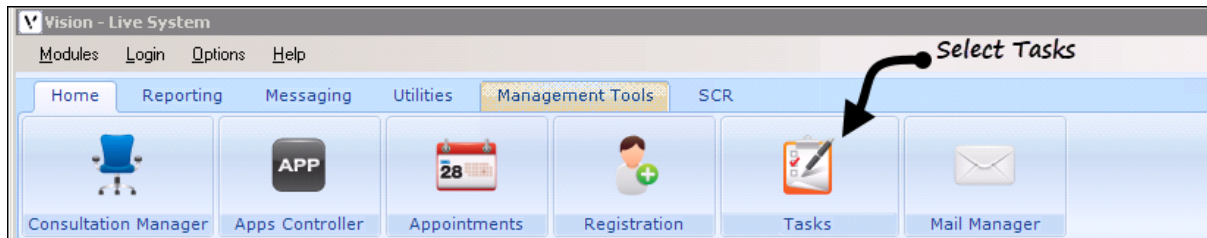
- Highlight one of the group headings in the lower left pane, for example Clinical Managers, or System Managers, right click and select **Add User(s) to Group**. Highlight the staff member to be added to the group and select **OK**.



For full information about Staff Groups in Vision 3, please see [Groups of Users in Security](#).

When Migration is Complete

Once you have migrated to Tasks, the **Daybook** button on the front Vision screen is updated to a **Tasks** button and the Tasks pane on your Vision 3 front screen is replaced by an expanded Helpline Blog pane.









You should now check your Task Templates and set the order they display in for each staff group, see [Editing or Deleting Task Templates](#) on page 16 and [Setting the Display Order of Task Templates](#) on page 17 for details.

Editing or Deleting Task Templates

To edit or delete Templates:

You must have administrator rights to access **Settings - Task Templates**, see [Security - Add User to Security Group](#) on page 14 for details.

1. From **Tasks**, select **Settings** .
2. Now select **Task Templates**  and all your Task Templates display.
3. Select the template you wish to edit or delete and the **Edit**  and **Delete**  icons display.
4. Select:
 - **Edit**  to update the details of the template. Make the changes required for the template and then select **Update** to save the changes.
 - **Delete**  to delete the selected template.


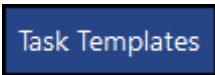
Your changes are now applied.

Setting the Display Order of Task Templates

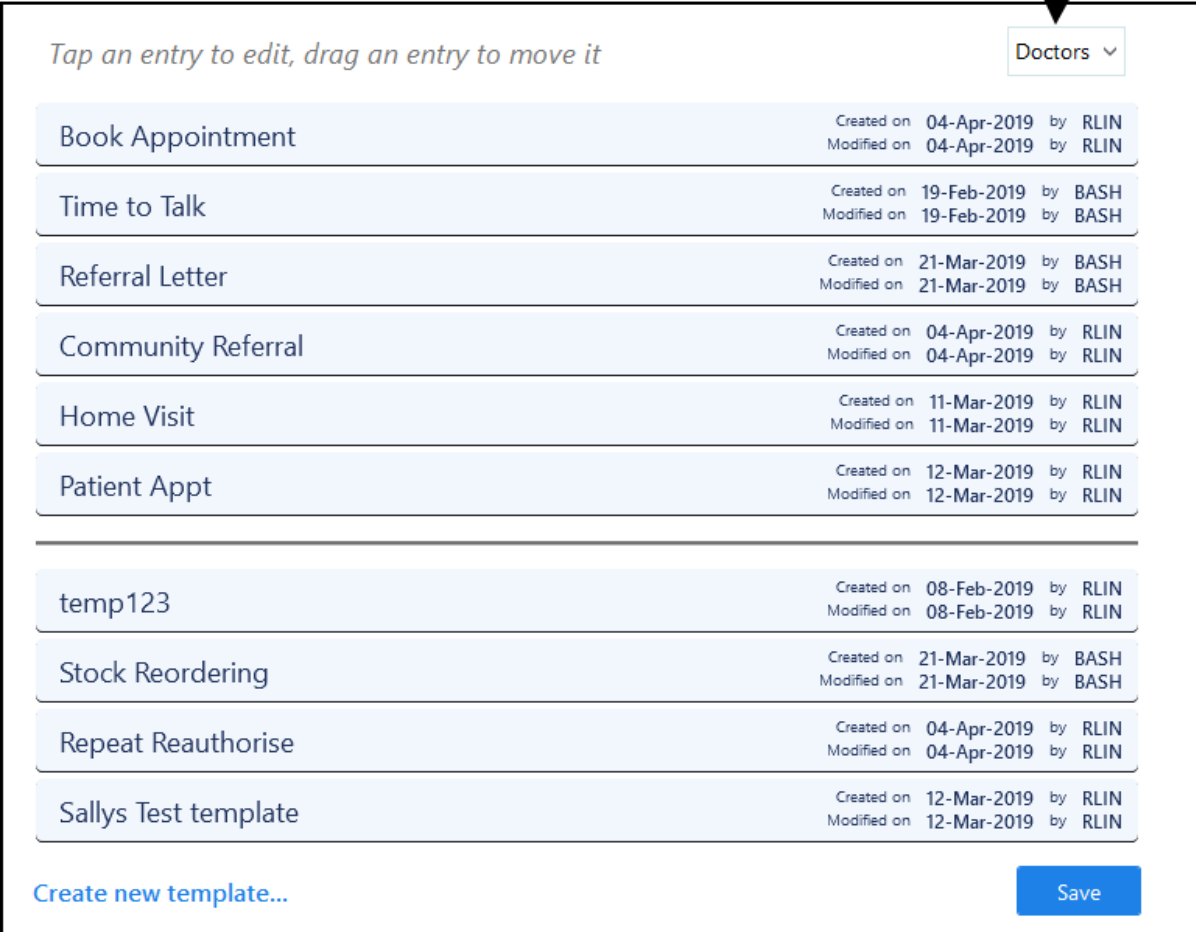
As a system manager you can create a quick list for any staff group to change the order of the Task Templates offered. This ensures your staff have quick access to their most commonly used templates, resulting in quick and consistent task creation.

You must have administrator rights to access **Settings - Task Templates**, see [Security - Add User to Security Group](#) on page 14 for details.

To set up quick lists:

1. From **Tasks**, select **Settings** .
2. Now select **Task Templates**  and all your **Task Templates** display.
3. From the staff group list, select the staff group you want to set up.

Select the group to set up



Tap an entry to edit, drag an entry to move it

Doctors ▾

| | |
|----------------------|---|
| Book Appointment | Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN |
| Time to Talk | Created on 19-Feb-2019 by BASH Modified on 19-Feb-2019 by BASH |
| Referral Letter | Created on 21-Mar-2019 by BASH Modified on 21-Mar-2019 by BASH |
| Community Referral | Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN |
| Home Visit | Created on 11-Mar-2019 by RLIN Modified on 11-Mar-2019 by RLIN |
| Patient Appt | Created on 12-Mar-2019 by RLIN Modified on 12-Mar-2019 by RLIN |
| <hr/> | |
| temp123 | Created on 08-Feb-2019 by RLIN Modified on 08-Feb-2019 by RLIN |
| Stock Reordering | Created on 21-Mar-2019 by BASH Modified on 21-Mar-2019 by BASH |
| Repeat Reauthorise | Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN |
| Sallys Test template | Created on 12-Mar-2019 by RLIN Modified on 12-Mar-2019 by RLIN |

Create new template... Save

4. Now, hold, drag and drop the templates into the order you require above the thick black line.

Drop the tasks above the thick black line to add them to the selected group's quick list

Tap an entry to edit, drag an entry to move it Doctors ▾

| | |
|-------------------------|---|
| Book Appointment | Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN |
| Time to Talk | Created on 19-Feb-2019 by BASH Modified on 19-Feb-2019 by BASH |
| Referral Letter | Created on 21-Mar-2019 by BASH Modified on 21-Mar-2019 by BASH |
| Community Referral | Created on 04-Apr-2019 by RLIN Modified on 04-Apr-2019 by RLIN |
| Home Visit | Created on 11-Mar-2019 by RLIN Modified on 11-Mar-2019 by RLIN |
| Patient Appt | Created on 12-Mar-2019 by RLIN Modified on 12-Mar-2019 by RLIN |
| Stock Reordering |   |
| temp123 | Created on 08-Feb-2019 by RLIN Modified on 08-Feb-2019 by RLIN |

Click to select, hold, drag and drop the tasks into the order required

5. Ensure the templates under the thick black line are in the order you want for this staff group and once you are happy with the order, select **Save** to save.
6. The **The templates were updated successfully** message briefly displays.

Important - Some of your staff may be in more than one group, we recommend you review your staff groups before migrating to Tasks, however some staff will always be in more than one group. Where a member of staff is in more than one group, the templates are offered in the following order: the first template in each staff group the staff member belongs to, then the second template from each group, then the third etc.