

## **2023/03/29 - Release Notes EpiSoft V2 Tasking Module**

The EpiSoft Tasking module has undergone a major upgrade with a number of user change requests in scope for this release:

### **Getting started / setup (groups and task types).**

Before you start using Task Module V2 in earnest, have you had your organisation's system administrator do the following:

Review and add to if need be the list of task groups that you want to use (we recommend role-groups where possible because it will be easier maintenance for you rather than a list of defined users)

Review and add to the list of task types that you want to use regularly and made sure that the default group is the one that should see the task?

Details on how to do this can be found at the end of the general user guide under the section titled for "EpiSoft System Administrators / Advanced Users"

If you set up properly with the groups you need and the task types that are frequently used, your organisation will get greater benefits out of the use the EpiSoft Task Module V2.

EpiSoft is happy to assist any of our customers who want help setting up their groups or task types. Note that role-based groups can include more than one role.

### **QUICK GUIDE TO TASK MODULE AND WHEN TO USE WHICH BUTTON**

The task module V2 is designed to be a communication tool within your organisation and the list of changes to the task will be stamped in the comments field so you can see the progress of the task.

#### **What is shown under My Tasks tab?**

Any task assigned to you as an individual or to a group of which you are a member.

They can be patient tasks or general / non patient tasks.

They should only be items that you have to action – if it is a group task, any member of the group could action that task (complete it, comment on it and leave it on the list, forward to somebody else or reply back to the previously assigned party).

You will see the top 200 tasks in your list ordered by Urgent, Tasks with no due date and then tasks with a due date in order of due date. There are multiple search fields to find tasks that you know have been assigned to you but not visible at the top 200 list.

### **When should I use the EDIT button?**

Only use the Edit button if you want to change the due date (or set a due date if one wasn't added originally), or change a task from not urgent to urgent (if it wasn't urgent but has become so), or change the subject or details text of the task.

Otherwise don't hit Edit. Hit something else.

### **When should I use the FORWARD button?**

If someone gave you a task to do and you are really not the person who should be acting on it, forward it someone else (or ideally a group).

This button was previously "Reassign". We have renamed it Forward so it's more like email terminology and works the same way. Type into the user search or the group search who you want to forward it to.

Tip for first release: Add the Comment AFTER you hit Forward.

You don't have to add a comment, you could just forward if you think it will be clear to the recipient of the task why they need to action it and not you.

### **When should I use the REPLY button?**

You want a quick way to redirect a task back to someone who sent you a task (this works EXACTLY like Forward except it loads the previously assigned user/s or group/s for your convenience).

*Example: I've got a task allocated from a colleague and need more info to action it - hit reply and then type in comment field - I need the following info. You will see that the reply option loads the last assigned user/s or group/s so check you are replying to the right person before saving.*

Make sure you check when the page opens in 'REPLY' mode that you check it is replying to who you want to reply to. The last assigned user will generally NOT be the task creator.

Tip for first release: Add the Comment AFTER you hit Reply.

You probably need to add a comment on a Reply otherwise the recipient/s of the Reply will not know why you have sent the task back to them.

### **When should I use SAVE AND COMPLETE button?**

If you complete a task you are completing this on behalf of all the assigned users and members of the group on that task - this means there is no further action necessary on this task by anyone. If you add a comment prior to hitting save & complete it will also save your comment.

### **When should I use the SAVE button?**

If the task is incomplete and you don't want to forward it to anyone else, you can add a comment and save. This will keep the task allocated to the same user/s or group/s but still active (ie there is still stuff to do but you want to make a record of progress).

If you add a comment prior to hitting save & complete it will also save your comment.

### **When should I use the DELETE button?**

If you have made a mistake such as adding a new task and adding it to the wrong patient. Delete the task and add it to right patient.

### **What if I want to see the task in My Tasks list after I've replied to it (I don't want it to disappear off my own To Do list).**

Add yourself to the cc list when you Reply.

### **What if I have a lot of tasks allocated to me personally (not a group) and I'm going away and need someone else to action them?**

Use the Bulk Forward option to move tasks from your list to someone else's. There are limited options to Bulk Forward in this release (due date or task type only) so you might have to check your My Tasks list to see what didn't get picked up by your Bulk Forward.

### **What if I want to see what tasks I created and their current status?**

Go to Sent Tasks tab.

### **What are Protocol Tasks?**

Tasks created within the definition of a protocol; the standard flow is to complete these on the nurse drug administration chart. If they are not completed on the nurse drug chart, they previously could clog up the tasks module hence we have moved them to their own tab.

Generally you can ignore this tab unless you are a local system administrator, you have a role in clinical governance and you are creating/defining protocols with task steps, you have a role in clinical trial data task compliance. This a read-only list however from the task main module, you can complete old tasks that were never completed if the due date is in the past.

**Every time I create a particular task, I need to assign it to the same few users - how do I make this easier?**

Talk to your local system administrator about setting up an ad hoc group with these 5 users and get them to tell you what they have named the group. From then on you can assign the task to one group, not 5 users.

**What is the quickest way to add a New Task about a Patient while in the patient record.**

Use the New Task button to the right of the Patient Timeline. See below

Welcome Nathan O'Ncolo EpiBase V2-HCC-Cabramatta-Oncologist - EpiSoft Only ? Logout

**Record Summary** Finch, Margaret DOB 3/12/1953 (69 years) UR# 12119 ID 12119 (M)  
Primary Clinician: Dr Ali Aloncono

**Clinical Summary**

**Principal Diagnosis** Malignant neoplasm of fundus of stomach

Phone 0414 911 927  
Mobile swoodhead@epi  
Email Next of Kin Home Phone Mobile

**Allergies/ADRs: Nil Known** [Summary](#)

**Visits (2)**

Date	Reason	Type	Clinician
7/03/2023	Crohns Disease	Phone consult	O'Neill, Chris (Oncologist - EpiSoft Only - HCC)
1/02/2023	Upper GI cancer	Booking visit	Aloncono, Ali (Oncologist - EpiSoft Only - HCC)

**Visit Notes**

Visit: 7/03/2023 Phone consult  
Note created: 7/03/2023 1:22:43 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)  
**Problem Detail**  
This is the only one of two fields which go to Visit Notes  
**Action plan/advice**  
This is the other one

Click this button to redirect to the New Task page within the patient record

**How do I know whether this task has just been assigned to me or it's a group task and I can see it as part of the group?**

See screenshot below – icon on task grid shows whether the task is a group task.

**My Tasks**

My Tasks | Sent Tasks | Protocol Tasks | Bulk Forward Tasks | Maintain Groups

+ New Task | Epi ID | MRN/UR# | Surname | First name | DOB | Type or Subject | Task ID | Due Date | Search | Clear | ?

Active ?

**Tasks**

- Folfinrina, Fergus (Urgent) - Diabetes - Review
- General (non patient) 31/12/2022 (Urgent) - High cost drugs - pharmacist review
- Alva, Clara** 5/01/2023 (Urgent) - Admin task - other
- General (non patient) 20/02/2023 - new task
- orfano, Triplet 1/03/2023 - Ocrelizumab checklist
- Tasker, Tessa 4/07/2016 - Ocrelizumab checklist
- Staging, Nona 7/01/2017 - High cost drugs - pharmacist review
- Newsome, Ada 25/01/2017 - High cost drugs - pharmacist review
- Newsome, Ada 28/01/2017 - High cost drugs - pharmacist review
- Newsome, Ada 28/01/2017 - High cost drugs - pharmacist review
- Resulti-Multi, Ian 9/02/2017 - High cost drugs - pharmacist review

**Alva, Clara** DOB 6/08/1949 (73 years) UR# ID 6851 (F)  
 Task created by: O'Neill, Chris  
 Task ID: 7224  
 Assigned to: Admin staff

Comments:

Edited 28/02/2023 1:17:23 PM All, Demo ( Admin Officer IC)  
 Due Date change: 5/01/2023 to 5/01/2023 (URGENT)

Created 2/01/2023 1:02:48 PM O'Neill, Chris (Oncologist - EpiSoft Only)  
 Task Type: Admin task - other  
 Due Date: 5/01/2023  
 Assigned to: Admin staff  
 Subject: Admin task - other  
 Details: There are no predetails for this task

Annotations:

- Currently assigned to detail provides the group name
- this symbol signifies this is a group task

If the above quick guide provides you what you need to know to get started, you can stop reading now. Further detail below.

## ADDITIONAL INFO / DETAILED GUIDE

New Layout shows the task list down the left and comments and threaded comments are always visible in the task pane. This makes the task module more 'conversational' - if you have a group of people working on the same task just add a comment and save to keep the conversation within the current group.

## Quick ways to add a New Task:

Link button + keyboard shortcuts - click the Question Mark icon to view the keyboard shortcuts at any time until you know them well. They will save time for power users!

The screenshot shows the 'My Tasks' interface. On the left is a sidebar with navigation links: Home, Patient Search, Patient List, New Patient, Documents, Reports, My Tasks (highlighted with a question mark icon), Messages, Scanned Documents, Authority Scripts, Unsigned Medications, Results Pending, Letters To Sign/Send, Manage Appointments, Booking Requests (131), and Patient Contacts/Recall. The main area is titled 'My Tasks' and has tabs for My Tasks, Sent Tasks, Protocol Tasks, Bulk Forward Tasks, and Maint. Below the tabs is a '+ New Task' button and search fields for Epi ID, MRN/UR#, and Surname. A yellow callout box points to a question mark icon in the 'Active' dropdown, stating: 'Keyboard shortcuts to add new task and other quick ways to navigate. Note: if you have added anything to the search fields 'Enter' will enable search (as does designated keyboard shortcut Alt+F)'. The dropdown menu lists actions and shortcuts: New task (Alt + N), Save (Alt + S OR Ctrl + S), Edit task details (Alt + E), Forward Task (Alt + A), Next task (Alt + Up Arrow), Previous task (Alt + Down Arrow), Search (Alt + F), Clear Search (Alt + R), and Complete task (Alt + \). The task details for 'Winkle, Gwe' are shown, including 'Task created by: O'Neill, Chris', 'Task ID: 9693', and 'Assigned to: O'Ncolo, Nathan'. A comments section with a rich text editor is also visible. At the bottom right are 'Save' and 'Save & Complete' buttons.

While in Patient Record you can access the New Task page by selecting this new button in the patient record buttons list (see below).

Welcome Nathan O'Ncolo EpiBase V2-HCC-Cabramatta-Oncologist - EpiSoft Only
?
Logout

Home
Record Summary
Edit Patient
Visit Details
New Visit
Contact/Recalls
Reminders/Tasks
Appointments
Booking Requests (8)
Patient Documents
Patient Reports
Referrals/Correspondence
Add Referral
Programs/Studies

## Record Summary

Finch, Margaret DOB 3/12/1953 (69 years) UR# 12119 ID 12119 (M)  
Primary Clinician: Dr Ali Aloncono

Clinical Summary

Principal Diagnosis

Malignant neoplasm of fundus of stomach

Phone

0414 911 927

Mobile

swoodhead@epi

Next of Kin

Home Phone

Mobile

Programs / Studies / Clinical Trials

Name

Screening/Enrolment date

ID

Allergies/ADRs: Nil Known

Summary

Visits (2)

Date	Reason	Type	Clinician
7/03/2023	Crohns Disease	Phone consult	O'Neill, Chris (Oncologist - EpiSoft Only - HCC)
1/02/2023	Upper GI cancer	Booking visit	Aloncono, Ali (Oncologist - EpiSoft Only - HCC)

Visit Notes

Visit: 7/03/2023 Phone consult

Note created: 7/03/2023 1:22:43 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)

Problem Detail

This is the only one of two fields which go to Visit Notes

Action plan/advice

This is the other one

Click this button to redirect to the New Task page within the patient record

Note the above quick link button does not (after adding new task) navigate you back to where you came from – it is a planned future enhancement to open in a new tab and close to navigate you back (let us know if that will be very useful and we will set priority). Meantime this page will open in the main patient record New Task page and you can create a new task for that patient.

In addition to the button navigation, there is also quicker navigation from the existing patient record menu Reminders/Tasks into tasks - the task list is now the first (default) tab via this menu item with Reminders and Admin Notes now at the end of this tab list.

The screenshot shows the EpiSoft patient management interface. The top navigation bar includes the EpiSoft logo, a welcome message for Nathan O'Ncolo, and a Logout button. The sidebar menu on the left lists various patient management options, with 'Reminders/Tasks' highlighted. The main content area displays the 'Reminders/Tasks' section for a patient named Margaret Finch, including tabs for My Tasks, Sent Tasks, All Tasks, Protocol Tasks, Admin Notes, and Reminders. A yellow callout box points to the 'Reminders/Tasks' menu item in the sidebar, indicating that navigation goes straight to tasks.

Reminders/tasks patient menu navigation goes straight to tasks (admin notes and reminders still there but moved to the end of the list of tabs)

## Quicker/Easier patient search

When creating a new task from within the My Task main menu option, you can now search for patient name as well as ID. The patient search typeahead will return you a list of matched patients with additional data to confirm you have the right patient before selection.



My Tasks

Active ?

Tasks

- Jones, Trixie (Urgent) - Test task for Trixi
- Viewhealth, Wizard (Urgent) - Admin task - other
- Jones, Trixie (Urgent) - Follow-up FBP
- Winkle, Gwen (Urgent) - Diabetes - Review
- Tester, Infusion 11/03/2023 (Urgent) - Cataract surgery data quality
- Buchanan, Jock Admin task - other
- General (non patient) Diabetes - Review
- General (non patient) 27/02/2023 - Non patient task- order impress
- Van De Meer, Emeline 4/03/2023 - Follow-up FBP
- Phobbed, Oph 11/03/2023 - Diabetes - Review
- Phobbed, Oph 12/03/2023 - Diabetes - Review
- Phinch, Photinius 12/03/2023 - ECG
- Phobbed, Oph 13/03/2023 - Diabetes - Review
- Oncodrug, Usa 14/03/2023 - Cataract surgery data quality

Patient

Urgent

Task Type

Due Date

Assigned Users

Assigned Groups

Subject

Details

Comment

Save Cancel

## Quick link into the Patient record (Record Summary) from Task Module

If you hover over the patient demographics at the top of a created task, this is a quick link in to the patient's Record Summary.

Log in to continue - Log in with x [CZ-5189] Make the task list pan x Testing Board - Jira x My Tasks x EpiSoft Helpdesk - 2023/03/28 R x Role Administration x +

staging.episoft.com.au/epiCommunities/EpiBase2/Tasking/MyTasks

JIRA CLOUD EpiMe Parking To Do [EM-4453] Patient s... epime Patient Logi... EpiSoft Helpdesk -... EpiSoft System - Lo... Govt Websites Imported epi-me Deploymen... JIRA active epics EpiSoft Work Items... My Tasks Changing Schedule... »

episoft

Welcome Nathan O'Ncolo EpiBase VZ-HCC-Cabramatta-Oncologist - EpiSoft Only ? Logout

Home

Patient Search

Patient List

New Patient

Documents

Reports

My Tasks

Messages

Scanned Documents

Authority Scripts

Unsigned Medications

Results Pending

Letters To Sign/Send

Manage Appointments

Booking Requests (131)

Patient Contacts/Recall

Pharmacy Orders

Program Management

Referrer Management

Billing Administration

System Administration

My Tasks

Sent Tasks

All Tasks

Protocol Tasks

Bulk Forward Tasks

Maintain Groups

+ New Task

Epi ID

MRN/UR#

Surname

First name

DOB

Type or Subject

Task ID

Due Date

Search

Clear

Active

Tasks

MORSE, Liam

(Urgent) - I am a task with no task type

Jones, Trixie

(Urgent) - Test task for Trixi

Viewhealth, Wizard

(Urgent) - Admin task - other

Jones, Trixie

(Urgent) - Follow-up FBP

Winkle, Gwen

(Urgent) - Diabetes - Review

Tester, Infusion

11/03/2023 (Urgent) - Cataract surgery data quality

Buchanan, Jock

Admin task - other

General (non patient)

Diabetes - Review

General (non patient)

27/02/2023 - Non patient task- order impress

Van De Meer, Emeline

4/03/2023 - Follow-up FBP

Phobbed, Oph

11/03/2023 - Diabetes - Review

Phobbed, Oph

12/03/2023 - Diabetes - Review

Phinch, Photinius

12/03/2023 - ECG

Phobbed, Onh

MORSE, Liam DOB 16/10/1994 (28 years) UR# 9229 ID 9229 (M)

Task created by: O'Ncolo, Nathan

Task ID: 9901

Assigned to: O'Ncolo, Nathan

Comments:

B I U abc

Created 28/03/2023 6:42:04 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)

Due Date: (URGENT)

Assigned to: O'Ncolo, Nathan (Oncologist - EpiSoft Only - HCC)

Subject: I am a task with no task type

Details:

Edit Reply Forward Delete

Save

Save & Complete

https://staging.episoft.com.au/epiCommunities/EpiBase2/RecordSummary?pid=9229

**Due date is no longer mandatory + we have a new Urgent flag**

This will ensure the task is at the top of the list but you also can filter to see only Urgent (select the dropdown list where it says Active and change filter to urgent if you wish)

## My Tasks

[My Tasks](#) | 
 [Sent Tasks](#) | 
 [Protocol Tasks](#) | 
 [Bulk Forward Tasks](#) | 
 [Maintain Groups](#)

[+ New Task](#) | 
 Epi ID | 
 MRN/UR# | 
 Surname | 
 First name | 
 DOB | 
 Type or Subject | 
 Task ID | 
 Due Date | 
 Search | 
 Clear | 
 ?

Active  
Tasks
 

- Jones, Trixie  
(Urgent) - Test task for Trixi
- Viewhealth, Wizard  
(Urgent) - Admin task - other
- Jones, Trixie  
(Urgent) - Follow-up FBP
- Winkle, Gwen  
(Urgent) - Diabetes - Review
- Tester, Infusion  
11/03/2023 (Urgent) - Cataract surgery data quality
- Buchanan, Jock  
Admin task - other
- General (non patient)  
Diabetes - Review
- General (non patient)  
27/02/2023 - Non patient task- order impress 👤
- Van De Meer, Emeline  
4/03/2023 - Follow-up FBP
- Phobbed, Oph  
11/03/2023 - Diabetes - Review
- Phobbed, Oph

Morrison, Patricia Anne **DOB** 18/03/1970 (53 years) **UR#** ID 3677 (**F**)

Patient: Morrison, Patricia Anne

Urgent: ☐

Task Type:

Due Date:

Assigned Users:

Assigned Groups:

Subject:

Details:

Comment:

You can save a task as urgent, with a due date or neither

Save Cancel

The order of the list (other than for completed tasks) is as follows: Urgent, followed by tasks with **no due date** followed by tasks **with a due date** in order of due date

For completed tasks, the order is: date task completed (derived from the date task last modified - 99% of the time this will be the completed date as

In addition to making the task due date no longer mandatory, the legend of task colours has some additional colour codes (see below)

**Task Type dropdown list is a typeahead dropdown list and is no longer mandatory**

If you use an existing task from the typeahead task type list, it will come up with default task definition including default group (if the task type has one) in the Assigned Groups text box, as well as the subject and details from the task definition. These can be edited if need be / tailored to the particular patient.

Alternatively if you can't find a task type to match your need for a task from available typeahead list of task types, you can leave the task type dropdown blank. If you do this, Subject becomes mandatory; the task subject then displays in the task grid in place of the task type text from the dropdown.

Both task type text and subject are searchable in the same search box.

[illegible]

However if you can't find a user task type that matches what you want and if the task type you want is not likely to be regularly needed, leave the task type dropdown blank and just type in the subject. This will appear in the grid on the left in the place of task type - if the task type is blank.

## My Tasks

[My Tasks](#) | 
 [Sent Tasks](#) | 
 [Protocol Tasks](#) | 
 [Bulk Forward Tasks](#) | 
 [Maintain Groups](#)

[+ New Task](#) | 
 Epi ID | 
 MRN/UR# | 
 Surname | 
 First name | 
 DOB | 
 Type or Subject | 
 Task ID | 
 Due Date | 
 Search | 
 Clear | 
 ?

Active
 ?

**Jones, Trixie**  
 (Urgent) - Test task for Trixi

Viewhealth, Wizard  
 (Urgent) - Admin task - other

Jones, Trixie  
 (Urgent) - Follow-up FBP

Winkle, Gwen  
 (Urgent) - Diabetes - Review

Tester, Infusion  
 11/03/2023 (Urgent) - Cataract surgery data quality

Buchanan, Jock  
 Admin task - other

General (non patient)  
 Diabetes - Review

General (non patient)  
 27/02/2023 - Non patient task- order impress

Van De Meer, Emeline  
 4/03/2023 - Follow-up FBP

Phobbed, Oph  
 11/03/2023 - Diabetes - Review

**Jones, Trixie** DOB 1/01/1990 (33 years) UR# 9671 ID 9671 (M)  
 Primary Clinician: Dr Simon Cologist  
 Task created by: O'Ncolo, Nathan  
 Task ID: 8489  
 Assigned to: O'Ncolo, Nathan

Comments:

Forwarded 7/03/2023 3:15:12 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)  
 Forwarded to: Adams, Joseph (Oncology nurse - HCC), Admin and Pharmacy

28/02/2023 12:36:27 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)  
 I'm going to complete this

Created 28/02/2023 12:31:57 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)  
 Due Date: (URGENT)  
 Assigned to: Administrator, EpiSoft (EpiSoft Admin - HCC)  
 Subject: Test task for Trixi  
 Details:

Edit | Reply | Forward | Delete

Save | Save & Complete

You can search the task type (dropdown list text) OR task subject from this field

Task ID is the unique ID across the system allocated to this task

## More flexible assignment and forwarding

In previous version you could allocate tasks to one user or one group. Now you can allocate your task to any number of users or groups.

Alva, Clara **DOB** 6/08/1949 (73 years) **UR# ID** 6851 (F)

Task created by: O'Neill, Chris

Task ID: 7224








Assigned to: Admin staff

Edit Reply Delete

Assigned Users Administrator, EpiSoft (EpiSoft Admin - HCC) X Tomtom, Tom (Organisation Admin - HCC) X

Assigned Groups Admin and Pharmacy X Greyhound Lovers group X | X

Comment

**B** **I** **U** abc       x<sub>2</sub> x<sup>2</sup>  (inherited size) ▼ A ▼

Save Cancel

Comments:

Edited 28/02/2023 1:17:23 PM All, Demo ( Admin Officer IC)

Due Date change: 5/01/2023 to 5/01/2023 (URGENT)

Created 2/01/2023 1:02:48 PM O'Neill, Chris (Oncologist - EpiSoft Only)

Task Type: Admin task - other

Due Date: 5/01/2023

Assigned to: Admin staff

Subject: Admin task - other

Details: There are no predetails for this task

typeahead to select users and add to the list

Typeahead to select group or groups

## More task module search parameters



## My Tasks

My Tasks
Sent Tasks
Protocol Tasks
Bulk Forward Tasks
Maintain Groups

+ New Task








Search
Clear
?

Active

?

Jones, Trixie

(Urgent) - Test task for Trixi

Viewhealth, Wizard

(Urgent) - Admin task - other

Jones, Trixie

(Urgent) - Follow-up FBP

Winkle, Gwen

(Urgent) - Diabetes - Review

Tester, Infusion

11/03/2023 (Urgent) - Cataract surgery data quality

Buchanan, Jock

Admin task - other

General (non patient)

Diabetes - Review

General (non patient)

27/02/2023 - Non patient task- order impress

Van De Meer, Emeline

4/03/2023 - Follow-up FBP

Phobbed, Oph

11/03/2023 - Diabetes - Review

**Jones, Trixie**
**DOB** 1/01/1990 (33 years)
**UR#** 9671
**ID** 9671
**(M)**

Primary Clinician: Dr Simon Cologist  
Task created by: O'Ncolo, Nathan  
Task ID: 8489  
Assigned to: O'Ncolo, Nathan

Comments:

B
I
U
abc
[align icons]
[bullet list icons]
[link icon]
[undo icon]
[redo icon]
x<sub>2</sub>
x<sup>2</sup>
[background color icon]
(Inherited size)
A

Save
Save & Complete

Forwarded 7/03/2023 3:15:12 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)

Forwarded to: Adams, Joseph (Oncology nurse - HCC), Admin and Pharmacy

28/02/2023 12:36:27 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)

I'm going to complete this

Created 28/02/2023 12:31:57 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)

Due Date: (URGENT)

Assigned to: Administrator, EpiSoft (EpiSoft Admin - HCC)

Subject: Test task for Trixi

Details:

You can search the task type (dropdown list text)  
OR task subject from this field

Task ID is the unique ID across the  
system allocated to this task

## Sent Tasks

From the Sent Tasks tab, you can see tasks you have created and assigned to others. From here you can forward to another party if they have been allocated incorrectly.

## Sent Tasks

My Tasks Sent Tasks Protocol Tasks Bulk Forward Tasks Maintain Groups

+ New Task Epi ID MRN/UR# Surname First name DOB Type or Subject Task ID Due Date Search Clear i

Active ?

Tasks

MORSE, Liam  
(Urgent) - I am a task with no task type

Jones, Trixie  
(Urgent) - Test task for Trixi

General (non patient)  
(Urgent) -

Viewhealth, Wizard  
(Urgent) - Admin task - other

paddy, Lockett  
(Urgent) - Admin task - other

Tester, Infusion  
11/03/2023 (Urgent) - Cataract surgery data quality

Goph, Phreddie  
28/03/2023 (Urgent) - Meningococcal vaccination status

Replica, Replicant

MORSE, Liam DOB 16/10/1994 (28 years) UR# 9229 ID 9229 (M)  
Task created by: O'Ncolo, Nathan  
Task ID: 9901  
Assigned to: O'Ncolo, Nathan

Sent tasks

B I U abc [formatting icons] (inherited size) A

Created 28/03/2023 6:42:04 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)  
Due Date: (URGENT)  
Assigned to: O'Ncolo, Nathan (Oncologist - EpiSoft Only - HCC)  
Subject: I am a task with no task type  
Details:

Edit Forward Delete

Save Save & Complete

## Bulk Forward Tasks

You can bulk forward tasks currently assigned to you to somebody else (user or group). For example if you are going on leave and another person will be actioning your tasks in your absence.

In Task Module V2 currently there are only two selection criteria being a selected task type or tasks within a due date range. We will be adding to these selection options over time based on feedback from our users.

Home

Patient Search

Patient List

New Patient

Documents

Reports

My Tasks

Messages

Scanned Documents

Authority Scripts

Unsigned Medications

Results Pending

Letters To Sign/Send

Manage Appointments

Booking Requests (131)

Patient Contacts/Recall

Pharmacy Orders

Program Management

Referrer Management

Billing Administration

System Administration

## Forward Tasks

My TasksSent TasksProtocol TasksBulk Forward TasksMaintain Groups

Task Type

Task due by range

Assigned Users

Assigned Groups

Save

You can bulk forward tasks currently assigned to you to somebody else.

For the initial release of Tasks V2, you can reallocate any meeting a selected task type...or within a due date range.

We can add other selection criteria as requested by task module users in future releases

CONTACT US

## All Tasks

This is a tab only available to some roles in an organisation such as senior practice managers, system administrators and the like. You can see All Tasks allocated to anyone by anyone in your organisation; you could reallocate them if need be from this tab.

It does not include protocol tasks which are in their own tab.



Maintaining Groups for an organisation does not have any special permissions in the system but we suggest you set up a policy where a small number of staff maintain the groups on behalf of everyone else so it can be centrally managed and everyone is aware what the groups are for and who is in them.

## Forward Tasks

My TasksSent TasksProtocol TasksBulk Forward TasksMaintain Groups

Task Type

Task due by range

Assigned Users

Assigned Groups

Save

Maintain Groups

+ Add new group

Group Name	Members	Created by	Date
	11	Dr Nathan O'Ncolo	14/01/2023
	2	Dr Chris O'Neill	14/01/2023
	1	Dr Nathan O'Ncolo	14/01/2023
%0a%0a	12	Dr Chris O'Neill	14/01/2023
Ad hoc V2 Tasks Group new	3	Dr Nathan O'Ncolo	12/01/2023
Admin and Pharmacy	11	Dr Nathan O'Ncolo	13/10/2014
Admin staff	12	Dr Ali Aloncono	27/08/2014
Clinical trials coordinators only Ali Aloncono	2	Dr Ali Aloncono	28/04/2022
Clinical trials coordinators, nurses and doctors	53	Dr Ali Aloncono	28/04/2022
Clinical trials tasks	10	Dr Ali Aloncono	16/03/2023
Compounders group	1	Dr Chris O'Neill	14/01/2023
CTU Group	43	Dr Ali Aloncono	6/10/2015
Follow-up phone calls	68	Dr Ali Aloncono	23/06/2015
Front desk staff (Demo and Aoife)	1	Dr Nathan O'Ncolo	6/09/2014
Get Stuff Done group	3	Dr Chris O'Neill	16/02/2023
GP Practice Nurses group.	57	Dr Nathan O'Ncolo	16/06/2014
GP shared care	1	Dr Ali Aloncono	13/02/2014
Greyhound Lovers group	3	Dr Chris O'Neill	15/01/2023
Group with 54 members and we dont know what it is1	54	Dr Nathan O'Ncolo	12/01/2023
Group with me	43	Dr Nathan O'Ncolo	1/07/2016

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Item 1 to 20 of 38

### *Role-based groups*

If you create a role-based group this will be easier to maintain than an other (ad hoc) group because it means anyone in that role (or roles) will receive a task assigned to that group.

You need to give the group a name (mandatory). The group name will be the item that is searchable by someone allocating the task so should be descriptive enough for users to know whos' in it.

To add more than one role to a role-based group, select the role from the dropdown and click add. This will build the list and make sure you hit save when the list of roles is what you want.

## Forward Tasks

My Tasks Sent Tasks Protocol Tasks **Bulk Forward Tasks** Maintain Groups

Task Type

Task due by range

Assigned Users

Assigned Groups

Save

Maintain Groups

+ Add new group

Group Name	Members	Created by	Date
	11	Dr Nathan O'Ncolo	14/01/2023
	2	Dr Chris O'Neill	14/01/2023
	1	Dr Nathan O'Ncolo	14/01/2023
%0a%0a	12	Dr Chris O'Neill	14/01/2023
Ad hoc V2 Tasks Group new	3	Dr Nathan O'Ncolo	12/01/2023
Admin and Pharmacy	11	Dr Nathan O'Ncolo	13/10/2014
Admin staff	12	Dr Ali Aloncono	27/08/2014
Clinical trials coordinators only	2	Dr Ali Aloncono	28/04/2022
Clinical trials coordinators, nurses and doctors	53	Dr Ali Aloncono	28/04/2022
Clinical trials tasks	10	Dr Ali Aloncono	16/03/2023

☒ Role-based group ☐ Other group

Group name

Role

Add

Role Name	Create User	Create Date	Users	
Oncology nurse	Aloncono, Ali	16/03/2023 12:41:41 PM	8	X
Clinical Trials Coordinator	Aloncono, Ali	16/03/2023 12:41:49 PM	2	X

Save

Cancel

Compounders group	1	Dr Chris O'Neill	14/01/2023
CTU Group	43	Dr Ali Aloncono	6/10/2015
Follow-up phone calls	68	Dr Ali Aloncono	23/06/2015
Front desk staff (Demo and Aoife)	1	Dr Nathan O'Ncolo	6/09/2014

Role-based group could have more than one role within it. Group name is mandatory

Other groups

You can do the same for other groups – select from a list of users in your organisation, click Add to build the list and Save when the built list is completed.





From the Reminders/Tasks patient record menu, you can access the Patient Record version of the tasking module.

All the same features are available here as documented above. Search fields search only this patient record.

All Tasks is visible to all users (unlike the main module where it is available to only senior system administrators) – for patient safety reasons so that everyone is aware what tasks are active / pending for a patient.

Sent reminders is still available in this module except their tabs have been moved to the right so tasking module is the default when you open from this menu item.

The screenshot displays the 'Reminders/Tasks' interface for a patient named MORSE, Liam (DOB 16/10/1994, 28 years, UR# 9229, ID 9229 (M)). A red banner alert indicates 'Notes Patient Banner alert'. The interface includes a left sidebar with navigation options: Home, Record Summary, Edit Patient, Visit Details, New Visit, Contact/Recalls, Reminders/Tasks (selected), Appointments, Booking Requests (0), Patient Documents, Patient Reports, Referrals/Correspondence, Add Referral, Programs/Studies, Wait List, Patient Search, Patient List, New Patient, Documents, Reports, My Tasks, Messages, and Scanned Documents. The main content area features tabs for My Tasks, Sent Tasks, All Tasks, Protocol Tasks, Admin Notes, and Reminders. A '+ New Task' button is present, along with search and clear buttons. A task list shows 'MORSE, Liam (Urgent) - I am a task with no task type'. The task details panel shows 'Task created by: O'Ncolo, Nathan', 'Task ID: 9901', and 'Assigned to: O'Ncolo, Nathan'. A comments section with a rich text editor and 'Save'/'Save & Complete' buttons is also visible. The bottom of the task details panel shows creation information: 'Created 28/03/2023 6:42:04 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)', 'Due Date: (URGENT)', 'Assigned to: O'Ncolo, Nathan (Oncologist - EpiSoft Only - HCC)', 'Subject: I am a task with no task type', and 'Details:'.

## **Additional Features For System Administrators and Protocol Creators**

### **Task Types**

The creation and maintenance of task types is a role-based privilege under System Administration. Let us know if you advanced system administrators do not have access to this. This was an existing page but has undergone a number of changes.

We have one or two old task types that are in use by multiple organisations and only one organisation can update the task definition. We will work with affected organisations to clone these so each organisation can maintain their own.

We have added some search fields and a new flag to set a protocol task. If you are not using the Protocol Administration module at all, you should never set this to true.

Home

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Booking Requests (131)

Patient Contacts/Recall

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Program Management

Referrer Management

Billing Administration

System Administration

Role Administration

User Preference

Organisation Preference

Calendar Settings

Roster Organisations

Patient Merge

Letter Templates

Reminder Template

Protocol Administration

Task Types

User Task Types

All Tasks

Non-Protocol

Protocol

Task type

Subject

Include active only

Search

Clear

+ Add User Task Type

User Task Type	Subject		Display Sequence	Active	Is Patient Task	Is Protocol Task	Default Group	
Admin task - billing	Admin task - billing	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Admin task - other	Admin task - other	View Detail	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Alarm bell - refer to cancer team	Refer back to Cancer team	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Multi disciplinary team	
Ankylosing Spondylitis Care Plan	Ankylosing Spondylitis Care Plan	View Detail	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Oncology nurse group	
Aoife's task	Aoife's task	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Approve costs	Approve costs	View Detail	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Greyhound Lovers group	
Assess efficacy	Assess efficacy of treatment	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Assess eligibility	Assess eligibility for registry enrolment	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Blood and urine results information	Blood and urine results information	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Breast Trial task test - associate steps	Initial assessment	View Detail	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GP Practice Nurses group	
C@H protocol task	C@H protocol task subject	View Detail	15	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CTU Group	
Cataract surgery data quality	Cataract surgery - missing final visit	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Cbel test task 2	Cbel test task 2	View Detail	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Oncology nurse group	
Cbel testing task type	Cbel testing task type	View Detail	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Group with me	
Central lab pathology	Biomarker kit	View Detail	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Clinical trials coordinators only Ali Aloncono	
Client assessment	PIR needs assessment (initial)	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Clinical Trials - Screening Visit	Screening	View Detail	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clinical trials coordinators, nurses and doctors	
Copy Forward	Copy Forward	View Detail	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cardiology group	
Create care plan	Create care plan	View Detail	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CTU Group	
Cruskit trial Nurse task	Nurse task	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Oncology nurse group	
Cruskit trial Screening Visit	Patient visit to screen for trial eligibility	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CTU Group	
CTU approval required	CTU approval required	View Detail	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Data Quality	Data Quality	View Detail	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Diabetes - Create new care plan with patient	Diabetes - Create new care plan with patient	View Detail	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Oncology nurse group	
Diabetes - diabetic diet preparation	Diabetes - diabetic diet preparation	View Detail	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Oncology nurse group	

1

2

3

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66 items in 3 pages

Maintenance of Task Types for your organisation

## More about Protocol tasks

See Quick Guide above for how protocol tasks are now separated from general tasks but in addition, we have made it easier to protocol definition creators to add protocol tasks while they are in the protocol administration module. See below.

## Adding protocols with tasks

You can now add task types while you are in the protocol definition page (task step page). There are quick link buttons to Add a new group or check members of an existing group as well as add a new Task Type.

If you add a new task type from here, it will be immediately locked down as a protocol task and cannot be used in the main My Tasks module. It is designed to be completed on the nurse drug administration chart.

The 'Clinician Task' step in a protocol should be linked to an appointment same as medication steps so that it always moves in synch with the appointment.

If the nursing staff fail to complete the tasks on the drug chart then they can be completed via the main tasks module (Protocol Tasks) however if this is a clinical trial protocol that could affect compliance / audit.

The screenshot shows the 'Edit Protocol Cycle' page for 'task test V2 tests protocol tasks'. The left sidebar has a tree view with 'Cycle', 'Medications', and 'Steps', where 'task' is selected. The main area contains a form with fields: 'User Task Type' (set to 'Cbcl testing task type'), 'Subject' (set to 'Cbcl testing task type'), 'Default Group' (set to 'Group with me'), and 'Details' (with text 'This will create a new task type for this protocol.'). To the right of the form are two buttons: '+ Add New Task Type' and '+ Maintain Groups'. At the top right are 'Close' and 'Copy From' buttons. At the bottom right is a 'Save' button. Three yellow callout boxes with arrows provide instructions: Box 1 points to the '+ Add New Task Type' button, stating '1. If you need to create a new task group you can create from here and set that as the default group in your new task type'. Box 2 points to the '+ Maintain Groups' button, stating '2. If you need to create a new task type when creating a task step in a protocol, you can add from here'. Box 3 points to the 'User Task Type' dropdown, stating '3. Once you have created a new task type via the button, your protocol task step will default to newly created task.' A status message 'Task type not found?' is displayed above the buttons. A note at the bottom right states: 'Previously this module defaulted to the first task in the list. Now the user task type will be blank by default and will prevent you saving if you don't select a task type'.

The function to assign a protocol task to a nursing group and to complete the task via the drug administration is existing v1 task function.

The new features are:

Quick links to add task types when needed during protocol creation (see above)

Any changes via Edit Protocol will be logged in the Protocol Tasks tab in the My Tasks main module as well as when completed.

Protocol tasks and non protocol tasks are now in completely separate tabs.

