

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 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 trail 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

episoft

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

Home

Record Summary

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 0414 911 927

Email swoodhead@ep

Next of Kin

Name Screening/Enrolment date ID Email 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.

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 displays the 'My Tasks' interface. On the left is a navigation sidebar with options like Home, Patient Search, Patient List, New Patient, Documents, Reports, My Tasks (highlighted with an exclamation mark), 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 includes tabs for My Tasks, Sent Tasks, Protocol Tasks, Bulk Forward Tasks, and Maintenance. Below the tabs are search filters for Epi ID, MRN/UR#, and Surname, along with a search bar and a 'Search' button. A 'Keyboard Shortcuts' popup is open, listing actions and their 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 + \). A yellow callout box notes: '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 task card for 'Winkle, Gwe' shows it was created by O'Neill, Chris, has Task ID 9693, and is assigned to O'Ncolo, Nathan. The comments section shows a history of forwarding and reassignment. 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).

episoft

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 0414 911 927
Email swoodhead@epi...
Next of Kin

Programs / Studies / Clinical Trials

Name	Screening/Enrolment date	ID	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

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 displays the EpiSoft interface for managing patient tasks. The top header includes the EpiSoft logo, a welcome message for Nathan O'Ncolo, and a 'Logout' button. The main content area is titled 'Reminders/Tasks' for patient Margaret Finch (DOB 3/12/1953, 69 years old, UR# 12119, ID 12119 (M)). The primary clinician is Dr. Ali Aloncono. The interface features several tabs: 'My Tasks', 'Sent Tasks', 'All Tasks', 'Protocol Tasks', 'Admin Notes', and 'Reminders'. A '+ New Task' button is prominently displayed, followed by input fields for 'Type or Subject', 'Task ID', and 'Due Date', along with 'Search' and 'Clear' buttons. Below these fields, there is a dropdown menu for 'Active' status and a list of tasks, with one task selected: 'Finch, Margaret' with a due date of '8/03/2023 - Follow-up Phone Calls'. To the right of the task list, there are buttons for 'Edit', 'Reply', 'Forward', and 'Delete'. A 'Comments' section is visible, containing a rich text editor with various formatting options (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, undo, redo, zoom in, zoom out) and a font size dropdown set to '(inherited size)'. At the bottom right of the comments section are 'Save' and 'Save & Complete' buttons. A yellow callout box with an arrow pointing to the 'Reminders/Tasks' menu item in the left sidebar contains the text: '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)'. The sidebar on the left includes options like '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', 'Wait List', 'Patient Search', 'Patient List', and 'New Patient'.

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.

The screenshot shows the EpiSoft 'My Tasks' interface. On the left is a navigation sidebar with 'My Tasks' selected. The main area displays a task for 'Patricia Morrison' with a 'Patient' dropdown menu open, showing a quick link to the patient's record. Below the patient information is a table of task details.

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

Task Details:

Patient: [patric](#)

Urgent	Episoft ID	Patient	DOB	MRN/UR#	Mobile	Email	Address
Task Type	3677	Morrison, Patricia Anne	18/03/1970				
	9290	Wilberforce, Patricia	01/09/1972	34234234	0424940914	edenmett@episoft.com.au	Coober Pedy SA 5723
Due Date	9668	Morrison, Patricia Anne	18/03/1970	9668			1/19 provence St Kingsford NSW 2032

Assigned Users:

Assigned Groups:

Subject:

Details:

Comment:

Buttons: 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.

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

Save Cancel

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

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

well (unless on the rare occasion you edit a task after it's completed).

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

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 Trbx
- 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

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

Patient: Morrison, Patricia Anne

Urgent:

Task Type: [Dropdown]

Due Date: [Calendar]

Assigned Users: [Text]

Assigned Groups: [Text]

Subject: [Text]

Details: [Rich Text Editor]

Comment: [Rich Text Editor]

Save Cancel

Legend additions:
Urgent (new category) tick the box to flag this
Pending (no due date) - pale grey
Note overdue is now orange and due due within 7 days is yellow

● URGENT ● Overdue ● Due within 7 days ● Pending (with due date) ● Pending (no date) ● Completed

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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.

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 | Info

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

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

Patient: MORSE, Liam

Urgent:

Task Type: Ocrelizumab checklist

Due Date:

Assigned Users:

Assigned Groups:

Subject: Ocrelizumab

Details

B I U abc [Rich Text Editor] (inherited size) A

- Have you received any live or live-attenuated vaccines in the 6 weeks prior to initiation of ocrelizumab or during treatment with ocrelizumab?
- Have you experienced a severe, life-threatening or disabling infusion-related reaction with prior infusions of ocrelizumab?
- Have you experienced hypersensitivity (acute allergic) reactions or severe pulmonary symptoms with prior infusions of ocrelizumab?
- Are you currently on immunosuppressive therapy (except for corticosteroids for symptomatic treatment of relapses)?
- Are you pregnant?
- Are you breastfeeding?

Comment

B I U abc [Rich Text Editor] (inherited size) A

Save Cancel

Task type has typeahead dropdown list

Which will load as per V1 the task definition subject + details

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.

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

Assigned Groups

Comment

B *I* U abc x_2 x^2 (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](#) | 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

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:

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

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

[Edit](#) | [Reply](#) | [Forward](#) | [Delete](#)

[Save](#)
[Save & Complete](#)

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

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

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:

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.

The screenshot shows a web application interface for 'Forward Tasks'. On the left is a navigation menu with items like 'Home', 'Patient Search', 'Patient List', 'New Patient', 'Documents', 'Reports', 'My Tasks' (highlighted with a red exclamation mark), 'Messages' (with a red exclamation mark), 'Scanned Documents', 'Authority Scripts', 'Unsigned Medications', 'Results Pending', 'Letters To Sign/Send' (with a red exclamation mark), 'Manage Appointments', 'Booking Requests (131)', 'Patient Contacts/Recall', 'Pharmacy Orders', 'Program Management', 'Referrer Management', 'Billing Administration', and 'System Administration'. The main content area has a title 'Forward Tasks' and a sub-header with tabs: 'My Tasks', 'Sent Tasks', 'Protocol Tasks', 'Bulk Forward Tasks' (selected), and 'Maintain Groups'. Below the tabs are input fields for 'Task Type', 'Task due by range' (with calendar icons), 'Assigned Users', and 'Assigned Groups'. A green 'Save' button is located below the 'Assigned Groups' field. A yellow callout box with a red arrow pointing to the 'Task Type' dropdown contains the following text: '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'. At the bottom right of the page, there is a small link that says '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.

All Tasks

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

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

Active ?

Tasks

- General (non patient) (Urgent) -
- MORSE, Liam (Urgent) - I am a task with no task type
- Jones, Trixie (Urgent) - Test task for Trixi
- General (non patient) (Urgent) - Data Quality
- paddy, Lockett (Urgent) - Admin task - other
- Viewhealth, Wizard (Urgent) - Admin task - other
- Winkle, Gwen (Urgent) - Diabetes - Review
- Folifirina, Fergus (Urgent) - Diabetes - Review
- Oppenheimer, Ophelia (Urgent) - Diabetes - Review
- Jones, Trixie (Urgent) - Follow-up FBP
- Birk Larsen, This (Urgent) - Follow-up FBP
- Citizen, Tracey (Urgent) - Ocrelizumab checklist
- Eggplant, Harriet (Urgent) - Ocrelizumab checklist

General (non patient)
Task created by: O'Ncolo, Nathan
Task ID: 7195
Assigned to: Administrator, EpiSoft

Comments:

Forwarded 28/02/2023
Forwarded to: Administrator, EpiSoft (EpiSoft Admin - HCC)

Created 16/12/2022 12:02:46 PM O'Ncolo, Nathan (Oncologist - EpiSoft Only)
Due Date: (URGENT)
Assigned to: O'Ncolo, Nathan (Oncologist - EpiSoft Only - HCC)
Details: ag.sdfkjdsgfdg.kjg

Edit Forward Delete

Save

Tab available to some users with advanced privileges

Maintain Groups

The maintain groups tab opens a popup from where you can see all the groups within your organisation and can create other groups if need be. You can also edit the members of an existing group by clicking the relevant row.

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

Task Type:

Task due by range:

Assigned Users:

Assigned Groups:

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

Maintain Groups

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 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

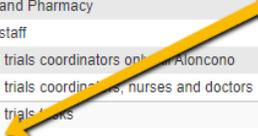
Role-based group Other group

Group name Role

Role Name	Create User	Create Date	Users
Oncology nurse	Aloncono, Ali	16/03/2023 12:41:41 PM	8 <input type="button" value="x"/>
Clinical Trials Coordinator	Aloncono, Ali	16/03/2023 12:41:49 PM	2 <input type="button" value="x"/>

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.

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

Role-based group
 Other group

Group name:
 User:

User Name	Create User	Create Date
No records to display.		

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

Other group can be an ad hoc list of users that have no role in common. You will need to maintain this list as new users join your organisation and need to see tasks for this group

Save

Tasks in the Patient Record

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 shows the 'Reminders/Tasks' interface for a patient named MORSE, Liam (DOB 16/10/1994, 28 years, UR# 9229, ID 9229 (M)). The interface includes a left-hand navigation menu with options like 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 has tabs for My Tasks, Sent Tasks, All Tasks, Protocol Tasks, Admin Notes, and Reminders. A '+ New Task' button is visible, along with search and clear buttons. A task is listed with the subject '(Urgent) - I am a task with no task type'. The right-hand side shows task details: 'Task created by: O'Ncolo, Nathan', 'Task ID: 9901', and 'Assigned to: O'Ncolo, Nathan'. There are buttons for Edit, Reply, Forward, and Delete. A rich text editor is present for comments, with a 'Save' button and a 'Save & Complete' button. The bottom of the task details 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)', and 'Subject: I am a task with no task type'.

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
 Patient Search
 Patient List
 New Patient
 Documents
 Reports
 My Tasks
 Messages
 Scanned Documents
 Authority Scripts
 Unsigned Protocols
 Unsigned Medications
 Future Cycles Needed
 Results/Letters Pending
 Letters To Sign/Send
 Manage Appointments
 Booking Requests (131)
 Patient Contacts/Recall
 Pharmacy Orders
 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

+ Add User Task Type

User Task Type	Subject	View Detail	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 checked="" 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

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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' interface for 'task test V2 tests protocol tasks'. The interface includes a sidebar with 'Cycle', 'Medications', and 'Steps' (with 'task' selected). The main area has a 'User Task Type' dropdown set to 'Cbel testing task type', a 'Subject' field with 'Cbel testing task type', a 'Default Group' dropdown set to 'Group with me', and a 'Details' section with the text 'This will create a new task type for this protocol.' To the right, there are buttons for '+ Add New Task Type' and '+ Maintain Groups'. A 'Task type not found?' message is displayed above these buttons. Three yellow callout boxes provide instructions: 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' (pointing to '+ Maintain Groups'); 2. 'If you need to create a new task type when creating a task step in a protocol, you can add from here.' (pointing to '+ Add New Task Type'); 3. 'Once you have created a new task type via the button, your protocol task step will default to newly created task.' (pointing to the 'User Task Type' dropdown). Other interface elements include a 'Close' button, a 'Copy From' button, and a 'Save' button.

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.

