Tasks and Followups - Overview

Last Modified on 21/05/2024 2:35 pm ACST

CareRight features two related concepts in management of *activities* within the system.

- Tasks - generally for day to day administrative of similar actions
- Followups - A task with a scheduled start time and due date, **usually representing a clinical safety matter.** Followups are specifically designed to meet the requirements of Criterion GP2.2 – Follow-up systems; allowing for the recording of contact attempts and recall of patients.

Tasks

A task can be set up to

- Assign to a Patient
- Assign to a Staff
- Assign to a Location
- Assign to a specific Group
- Created by a specific Group

Terminology

Item	Description
My Tasks	Tasks assigned to you
Other Tasks	Other Tasks assinged/unassign to other users in the same Group as you
Tasks Type	Task name
Location	Location the Tasks has been assigned to
Author	Task creator
Patient/Contact	Patient or Contact the Task is created for
Note	Notes created for this particular task i.e See Dr James before completing this task
Start Date	Start date set for this task. Technically, this is **planned Follow Up**
Due Date	Due date of this task. Technically, this is **planned Follow Up**
Due Time	Complete this task by the time set
Show	Show task details
Unassign	Unassign the task from your username and it will be moved to Other Tasks

Mark as Read	Mark the task as Read
Complete	Task Completed
Inbox	A display of task allocated to you and Other Tasks
Outbox	Task you have created
Completed	Task completed by you
Tasks for others	List of Other Tasks
Search	Search for a all Task Type, Author, Assigned to, Assigned Location, not or status

Task Management

Task Management can be completed via:

- CR Dashboard > Tasks. See Viewing my tasks via Dashboard.
- Patient Record > Tasks. See View Tasks from Patient Record.
- Location > Tasks. See View Tasks from Location.

Please refer to Tasks Configuration for more information.

View My Tasks via Dashboard

See also: Dashboard Interface

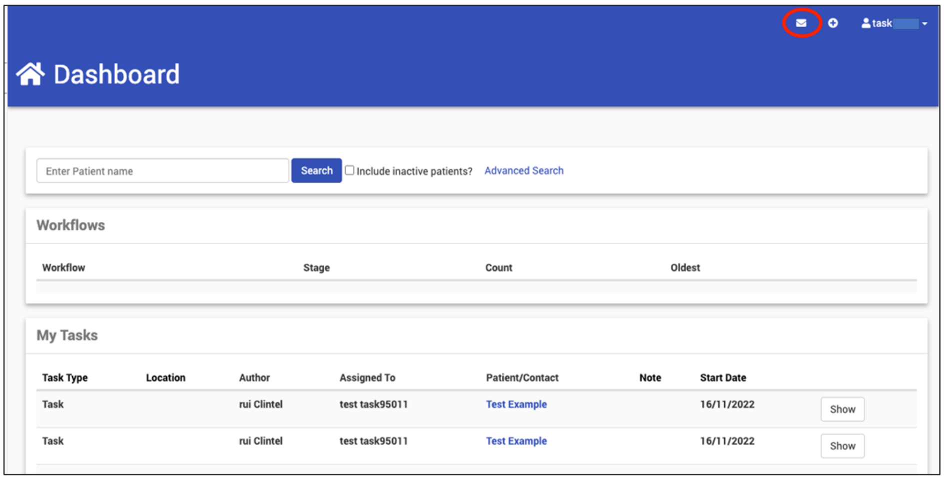
Steps:

1. Dashboard
2. My Tasks

Or

1. Dashboard
2. Tasks
3. My Tasks

Note: A user will get a notification when a task has been assigned.



Add Task via CR Dashboard

Steps:

1. Click **Dashboard**

2. Click **Task**

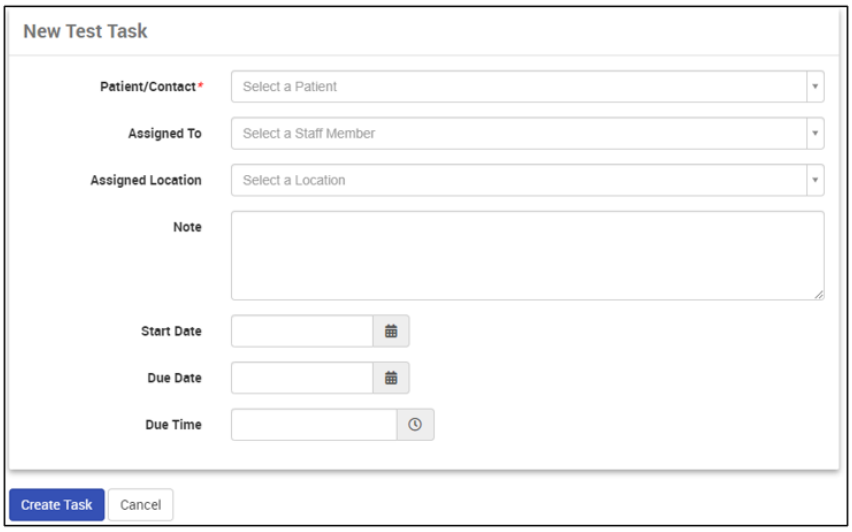
3. Click **New**

4. Select **Task type**

5. Select and complete relevant fields:

- Patient/Contact
- Assigned to
- Note
- Start Date
- Due Date
- Due Time

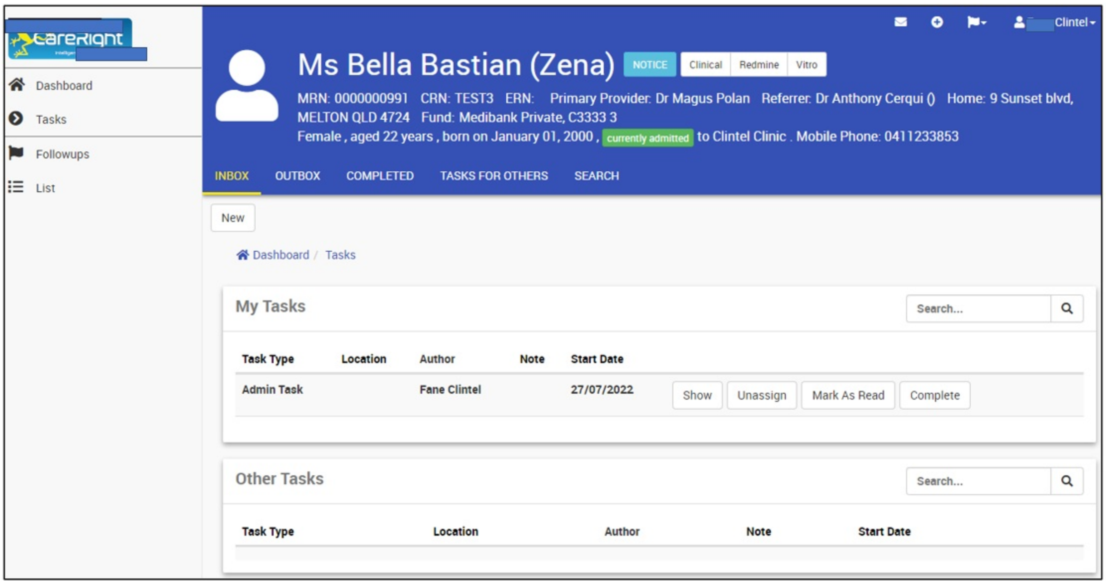
6. Click **Create Task**



View Tasks from Patient Record

Steps:

1. Patient Record
2. Tasks



Followups

CareRight allows you to assign an Item (document/ test result/task) to a staff member and mark it for Follow Up by a certain date. Follow Ups can be viewed at four levels:

Level	Description	Navigation (Dashboard > ...)
Globally	View Follow Ups for the Entire organisation	> Followups
Location	View Follow Ups for a specific location	Locations > View Location > Followups
Provider	View Follow Ups for a specific provider	Providers > Show > Followups
Patient	View Follow Ups for a specific patient	Patients > Show > Followups

To access follow ups, from the CR Dashboard:

1. In the Main Menu, click **Followups**.
    a. The follow-ups screen will display the following fields for any outstanding follow up items (Note: this displays in oldest outstanding follow up first).

2. Options available:
    a. Show: This will open the record for review - you can then action it from the show screen.
    b. Complete: Complete the follow up but not the item.

Field	Description	Example
Item Type	This is the type of item requiring follow up.	Results or letter
Location	This is the associated location	Canberra
User	This is the user the follow up is assigned to.	Dr Ratko Ned
Patient	This the associated patient (if relevant)	Ms Anna Nicole
Start Date	This the start date or creation date of the follow up	15/09/2017
Due Date	This is the due date for the follow up (Note: if this has past then the dates will be in red)	25/09/2017
Complete	This is the status flag	No
Show (Button)	Select this button to review the follow up and associated item	
Complete (Button)		

A provider can access any outstanding items where follow-up is set:

Accessing Follow Ups

From the CR Dashboard:

1. Click **Providers**.
2. Select specific Provider from list.
3. Select **Show**.
    a. The Provider menu will display.
4. Select **Followups**.

a. The follow-ups screen will display the following fields for any outstanding items.

Field	Description	Example
Item Type		Results or letter
Location		Canberra
Patient		Ms Anna Nicole
Start Date		15/09/2017
Due Date		25/09/2017
Due Time	Optional	17:00
Complete		No
Show (Button)		
Complete (Button)		

After uploading a Document you can mark it for Follow Up by a staff member:

1. From a Patient Record → **Documents**.
2. Find the document and click **Show**.
3. Click **Follow Up**.
4. Set the:
    a. Start Date - this is the date that the document will start to show in the Follow Up section.
    b. Deadline Date - this is the date that Follow Up needs to be actioned by, after this point it is overdue and will show as red in Follow Ups.
5. Click **Create Follow Up**.

A document can be marked as complete once it has been reviewed/followed up.

Follow Up an Item (action)

From the CR Dashboard:

1. In the Main Menu, click **Followups**.
    a. The follow-ups screen will display the following fields for any outstanding items.
2. Select **Show** next to the relevant item for followup.
3. Select the **Followup Item** button.
    a. This will take you to the associated item area i.e. Task or Result
4. Action the item accordingly i.e. Complete.
5. Select the **History** button in the Follow ups section.
    a. This will open the followups screen.
6. Select **Complete** to close the follow up (moved to Complete Tab).

Complete a Followup

From the CR Dashboard:

1. In the Main Menu, click **Followups**.
    a. The follow-ups screen will display the following fields for any outstanding items
2. Select **Show** next to the relevant item for followup.
3. Review the item, from here you can:
    a. Follow up item - this actions the item flagged for follow up i.e. Task, Letter, Result
    b. Edit - allows for the dates to be modified.
    c. Complete - this completes the follow-up, displays the message "Followup was successfully completed"

Note: It is important to complete the associated item/task (Follow up item) before "completing" the Follow-up .