3. Task Inbox
Clinical Users

Scenario

You are a Clinician reviewing the documents sent to you via Docman 10 to apply any Quicksteps/Tasks/Comments as required per document.

Task

- From the Home screen, click on **Tasks** tile in the blue bar – This takes you to your Task Inbox.

This will show you the tasks associated with the patient documents, ordered by Urgency, and then most recent first.

- Using the left to right working methods, **click** on the top Task Card

Details of Task type, Document type, Patient details, Priority and any Comments are all shown in the Task Cards.

This will then display the preview of the document in the middle of the screen, and any subsequent Tasks available on the right.

- On the right-hand side, you will see headings: View in [Clinical System] / Annotate / Quicksteps / Add Tasks / Add Comments / More Actions.
  Clicking on these headings will show you all the content available.

The functions of CC and Forward are available in More Actions.

NB. 'View in [Clinical System]' function will not work in the familiarisation Application.

You can choose an action from these submenu's and click confirm. You can also select an item as a favourite which will display the chosen item on the main screen under the relevant heading. By clicking on the Star outline, making it 'solid' will define it as a favourite. Repeat as required.

- Please process the Tasks in your inbox using Quicksteps and/or Tasks and Comments to reflect your decision-making process for the documents. (A small number of example Quick Steps,Tasks and Comments etc have already been set up as favourites. You can add to your favourites by using the 3 dots **…** to the right of the section)

Repeat

Please process the other documents in your inbox, with various outcomes using the tools available in the Task inbox

Outcome

This task will allow the user to build their confidence to add Quicksteps / Tasks / Comments as required to ensure the document is completed directly, or tasked to the relevant team or individuals to complete.