

## 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.

#### **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.