How to Create a Custom Task in Cloud

Communication · https://cclearninghub.co.uk/docs/how-to-create-a-custom-task-in-cloud/

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Kieran Worth

This guide explains how to create and configure a custom task within the Admin app, allowing you to tailor workflows to meet specific operational or care needs.

Custom tasks are essential for improving efficiency, ensuring consistency, and reducing the risk of missed actions. By standardising how tasks are created and assigned, staff can follow clear instructions, stay accountable, and deliver more reliable care and service.

By following this guide, you will learn how to:

- Create a new custom task from scratch
- Define task types, priorities, and scheduling
- Assign tasks to staff, roles, or residents
- Configure recurrence for ongoing activities
- Set response requirements and notifications
- Apply additional settings to control task behaviour

This ensures your tasks are structured, clearly communicated, and consistently completed, supporting smoother workflows and better outcomes.

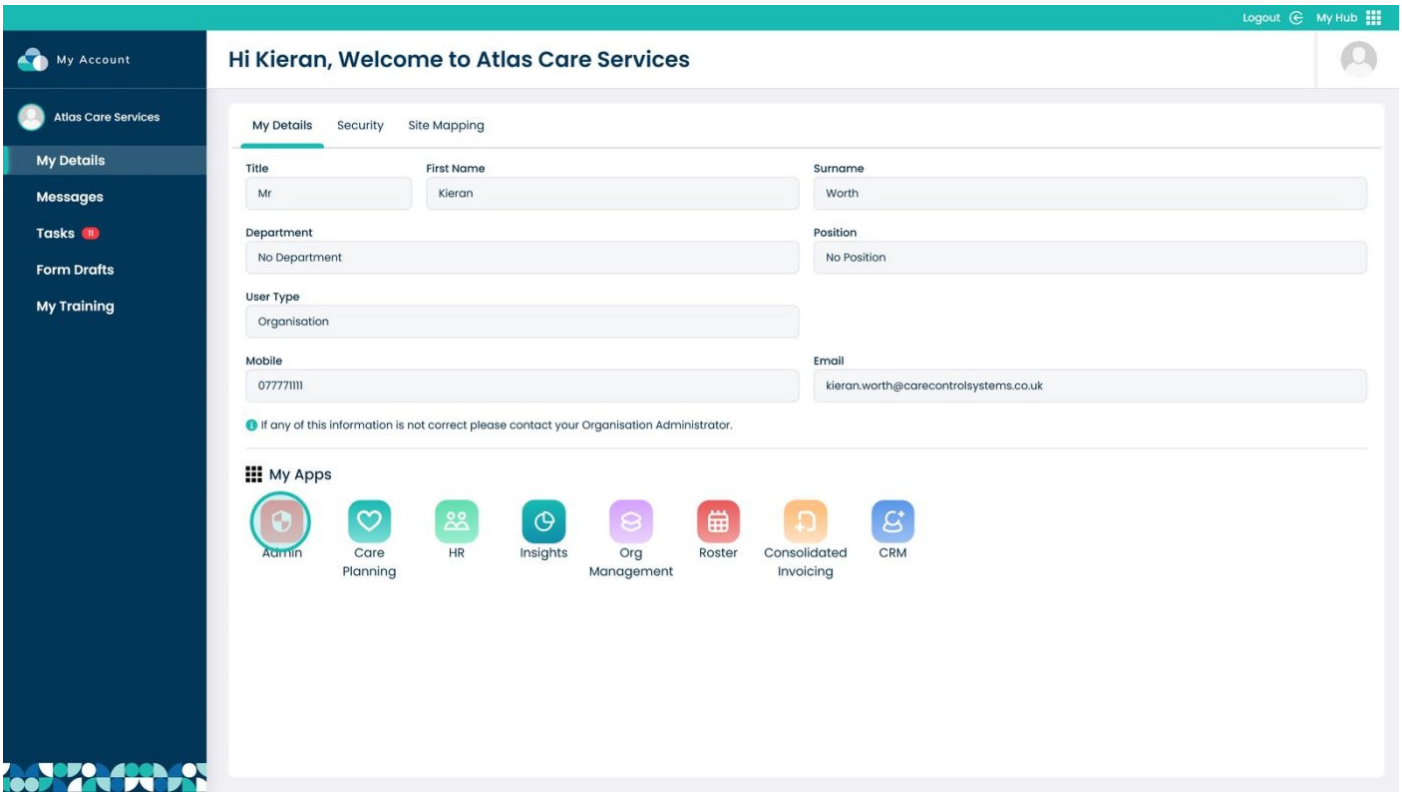
Interactive Guide

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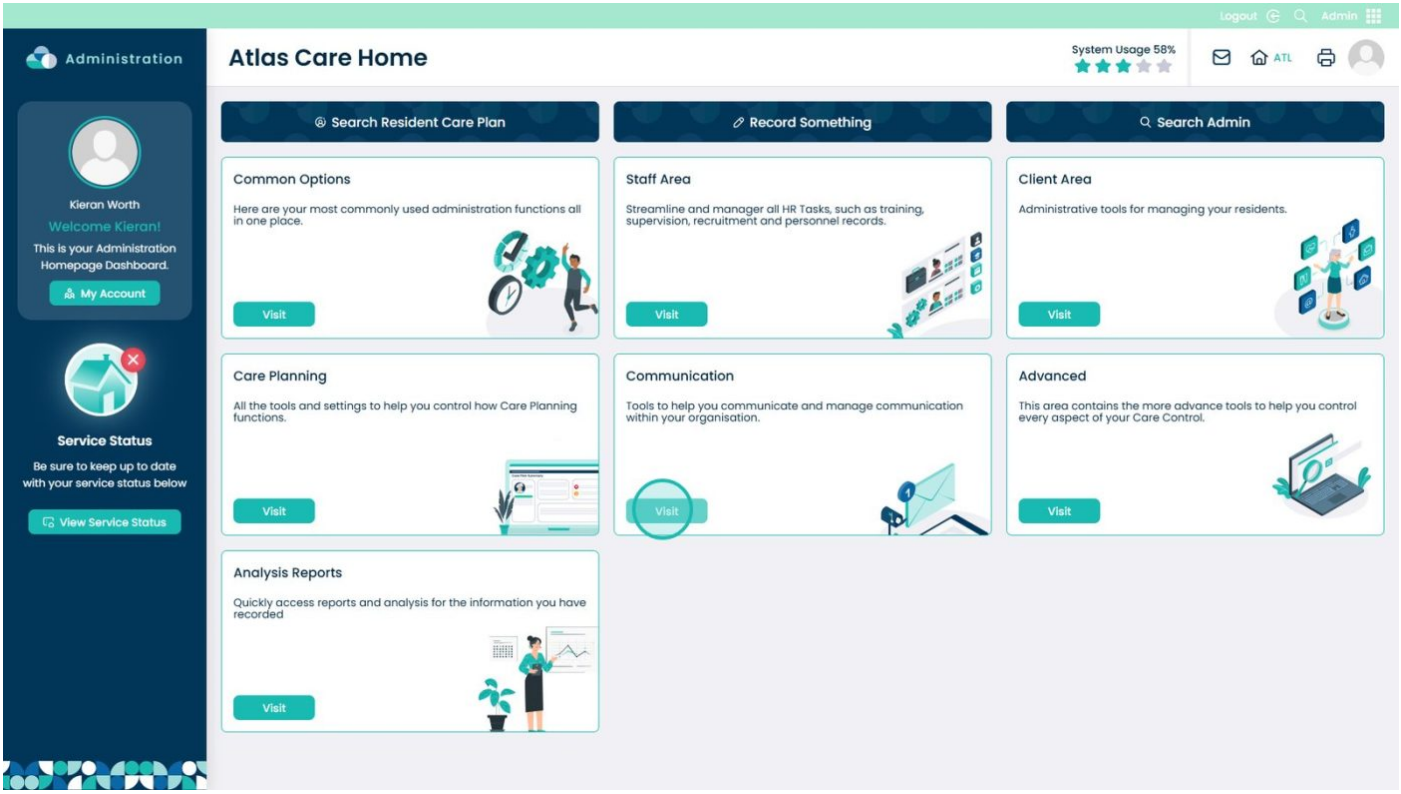
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Text based guide

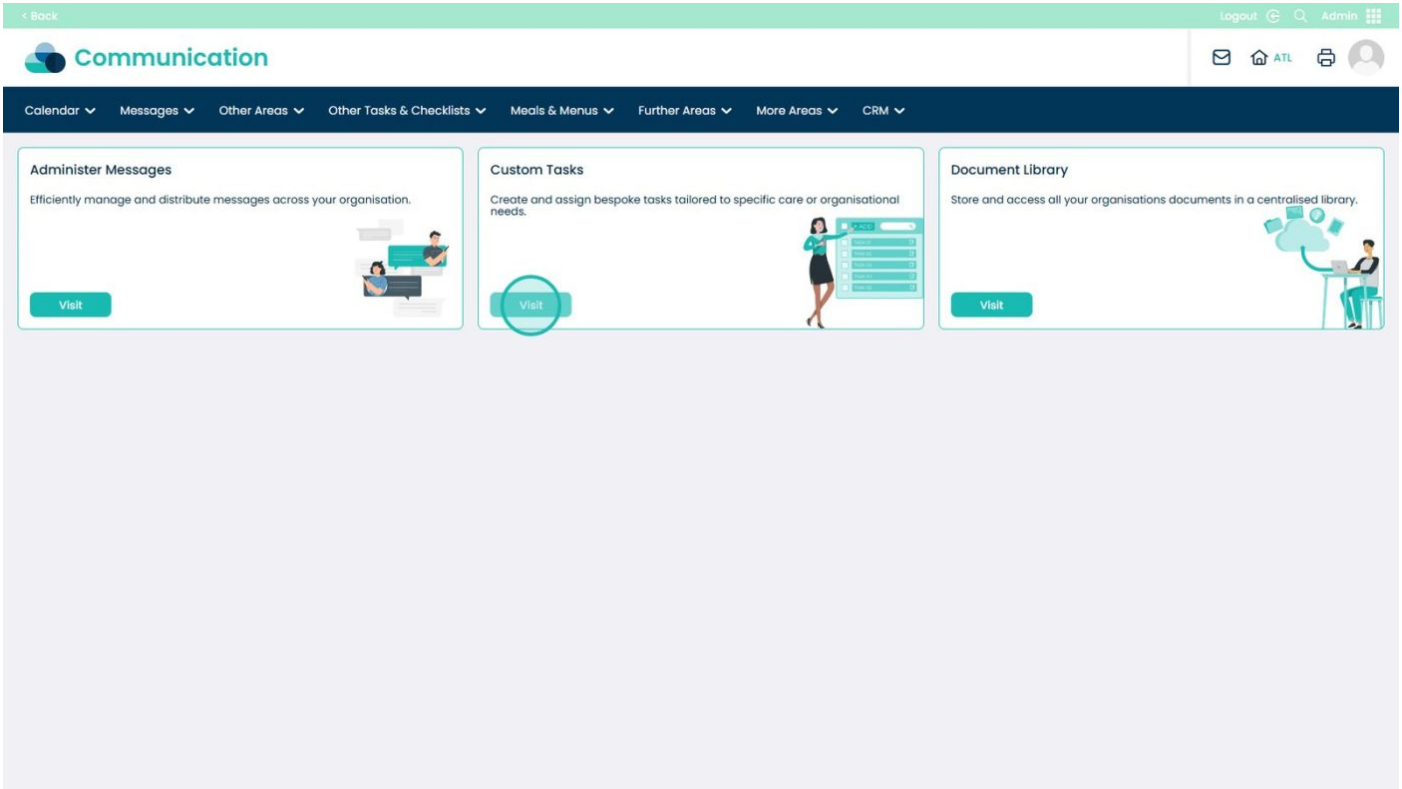
Launch the Admin app to access the system management features.



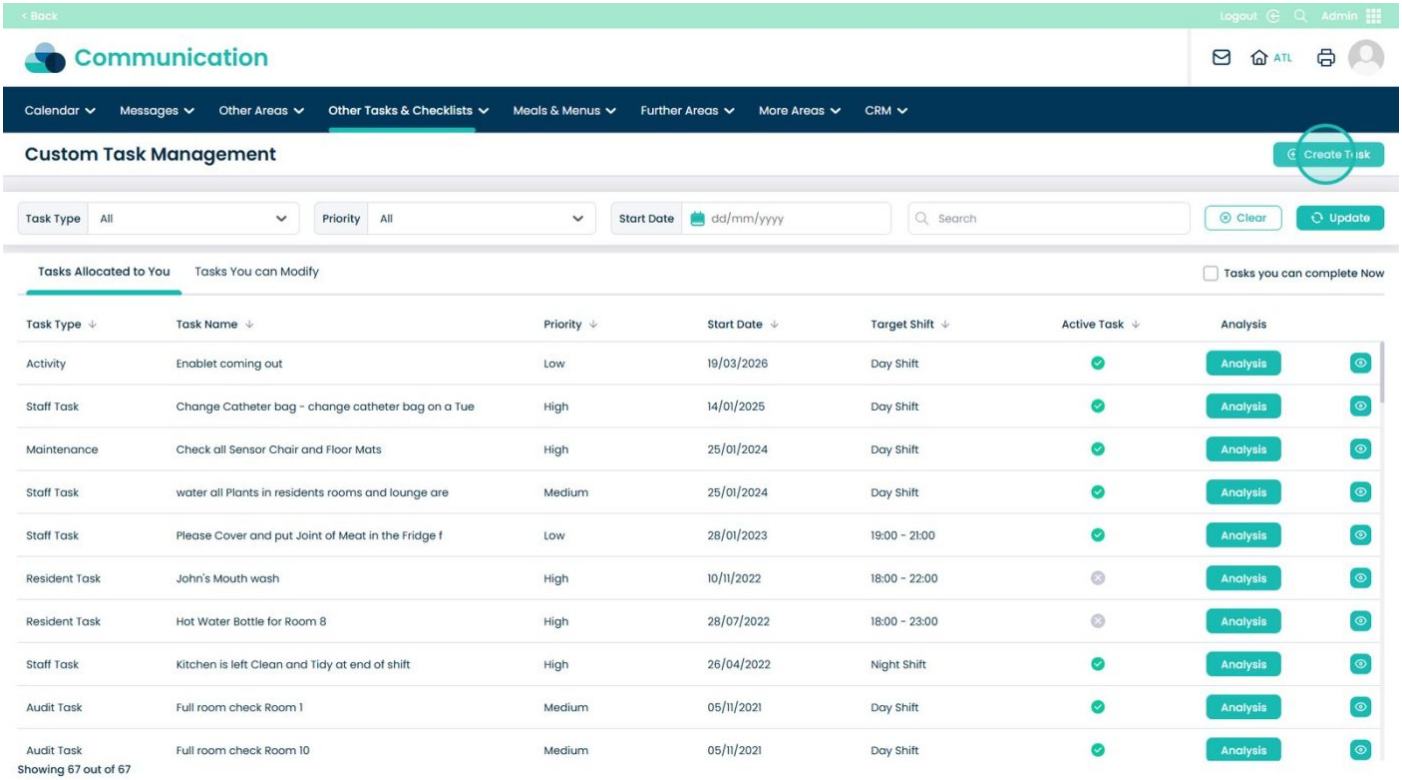
Click the Communication section to manage messaging and task settings.



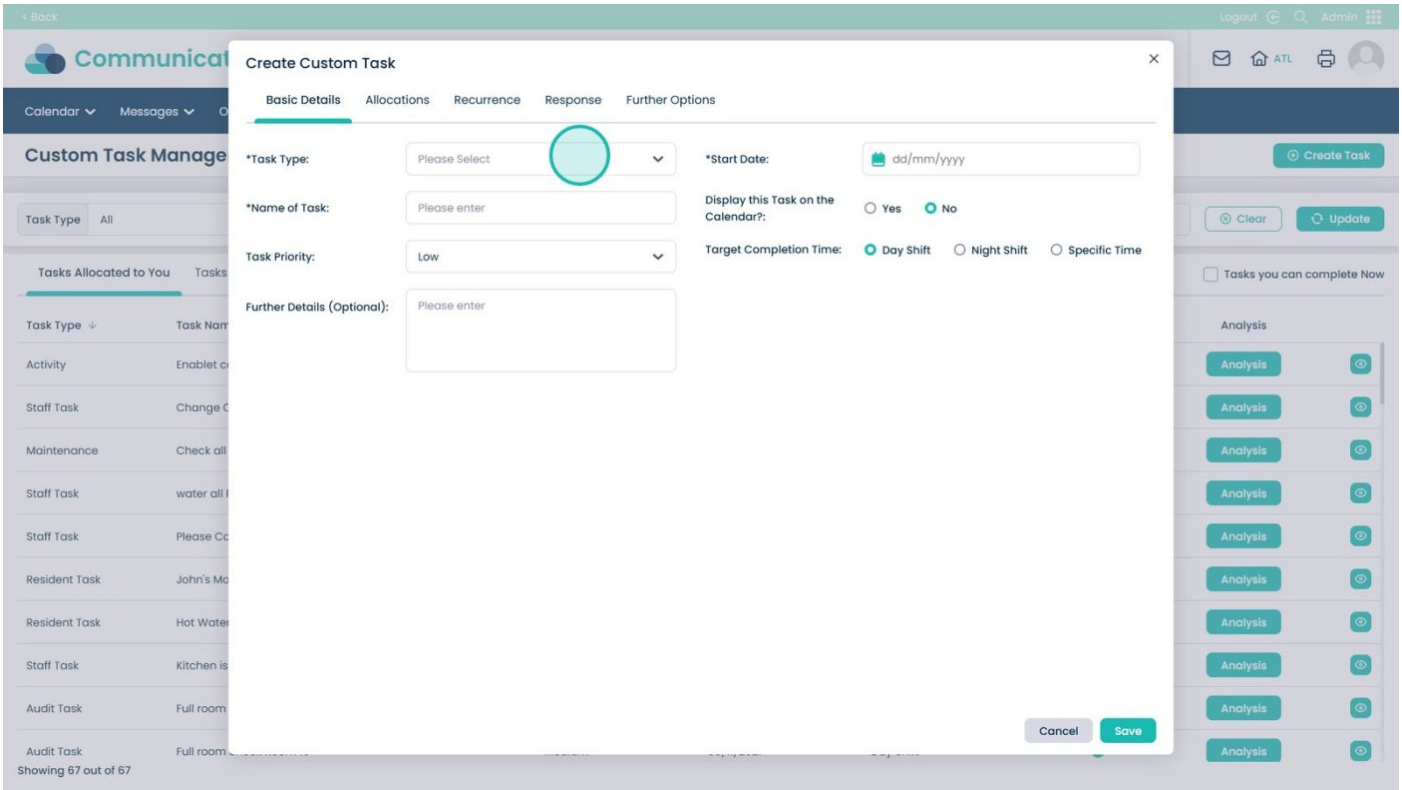
Click Custom Tasks to open and manage tailored task workflows.



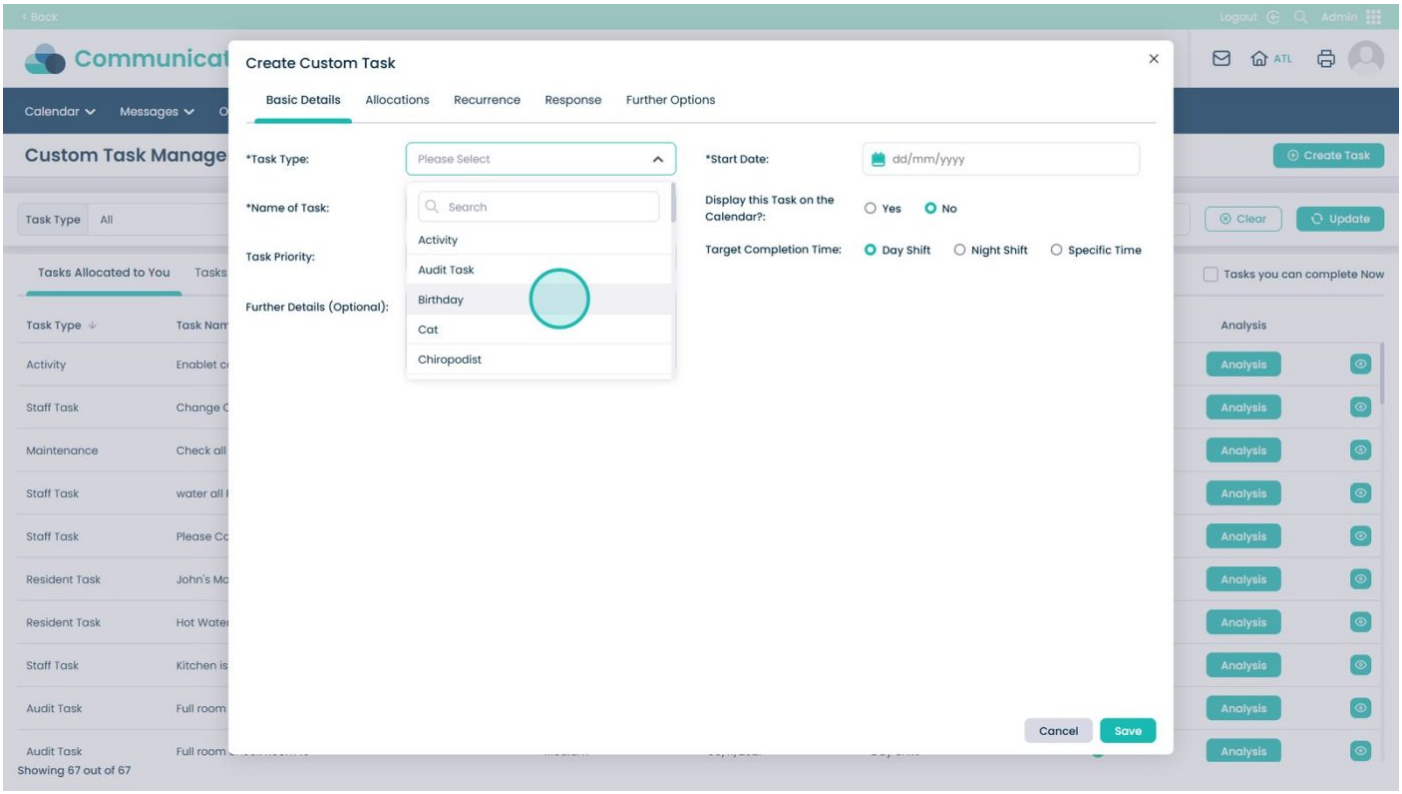
Click the Create Task button to start building a new custom workflow.



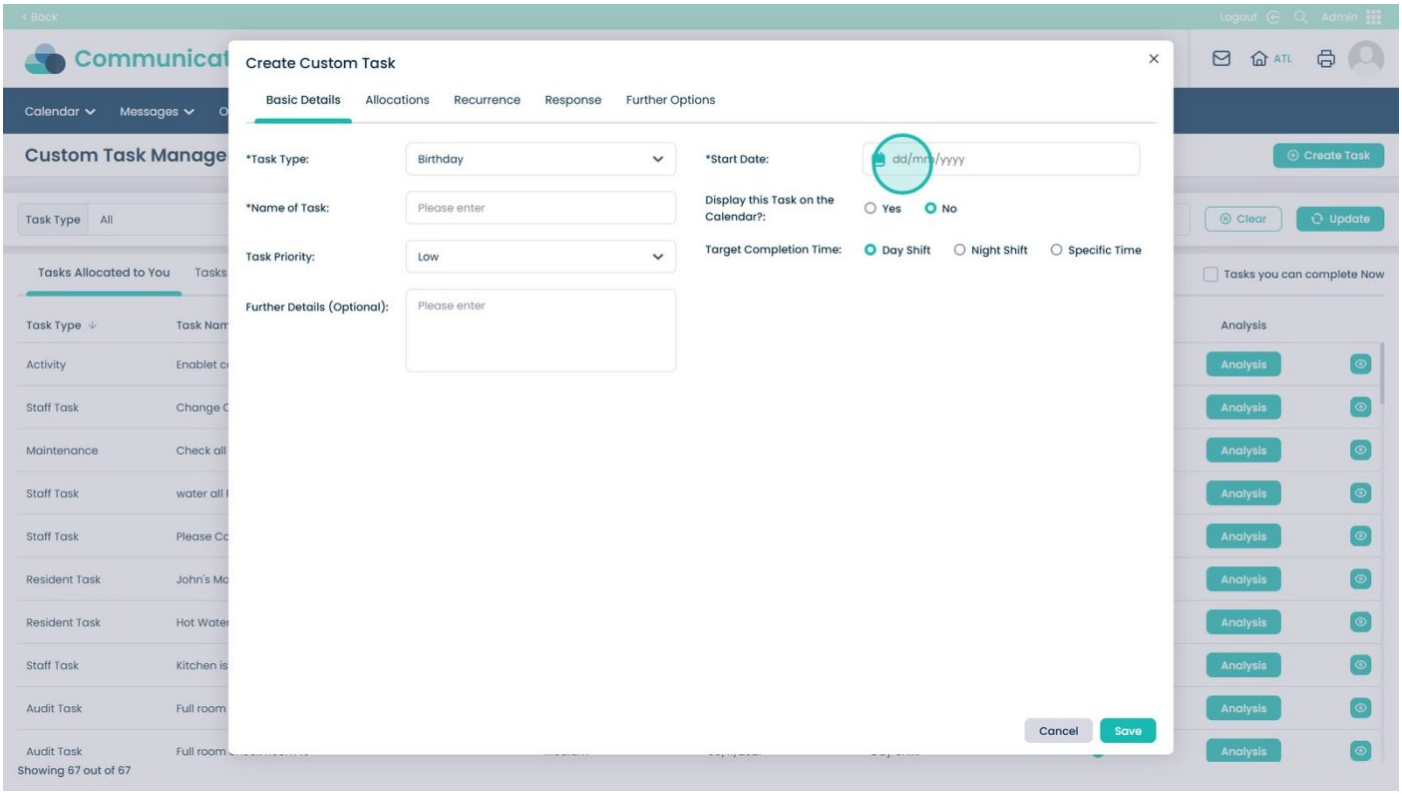
Select a task type to define the purpose of your custom task.



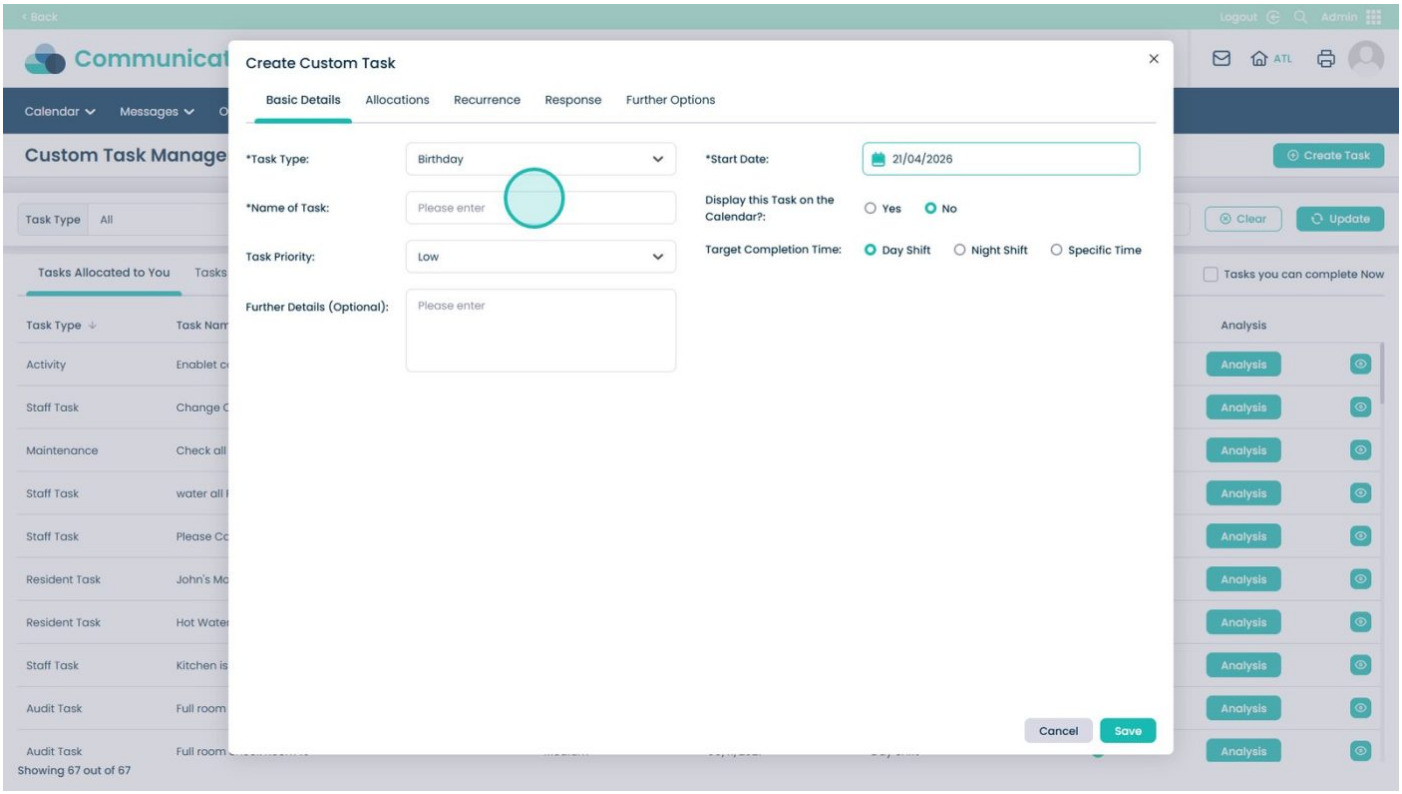
Select a task type from the list to continue. In this example, choose Birthday.



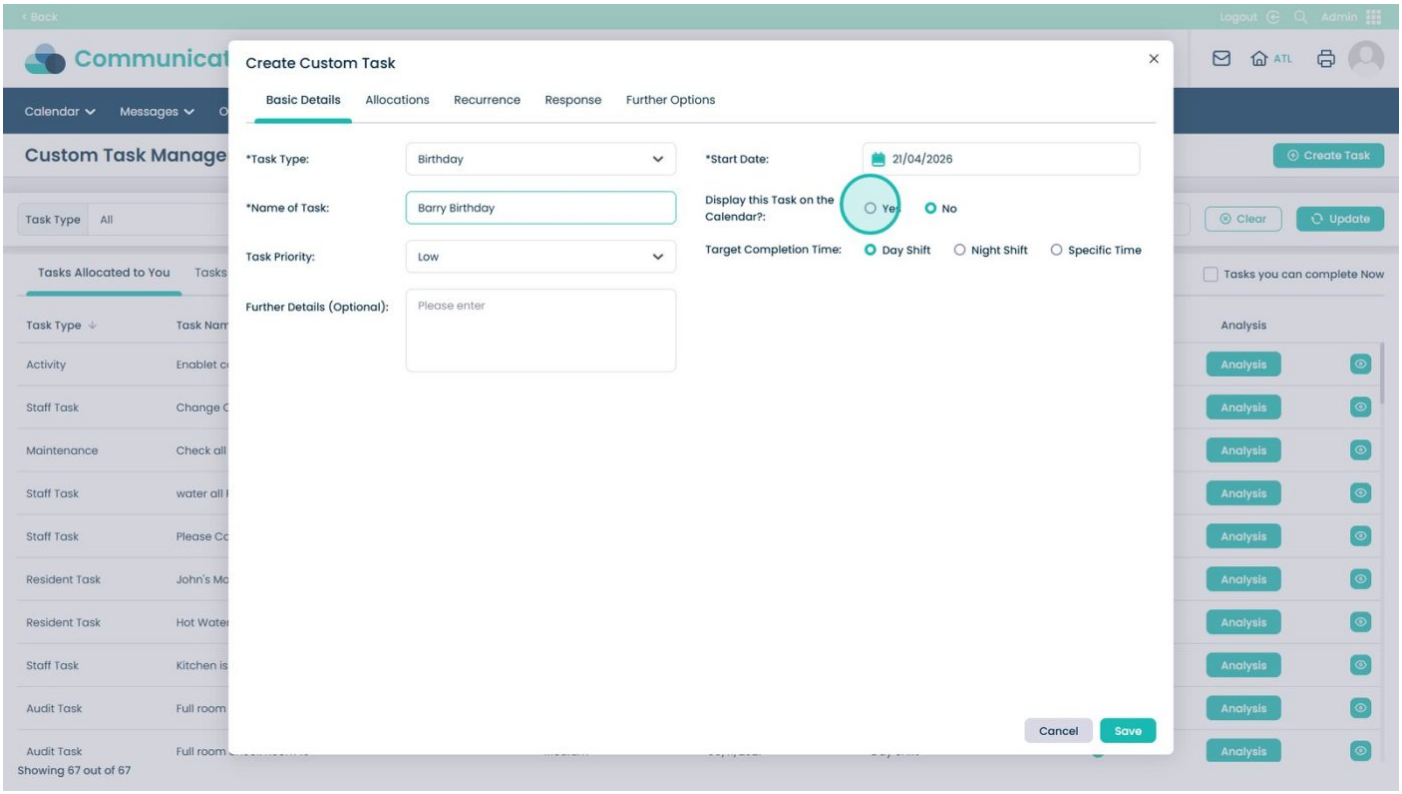
Select the start date to control when the task begins.



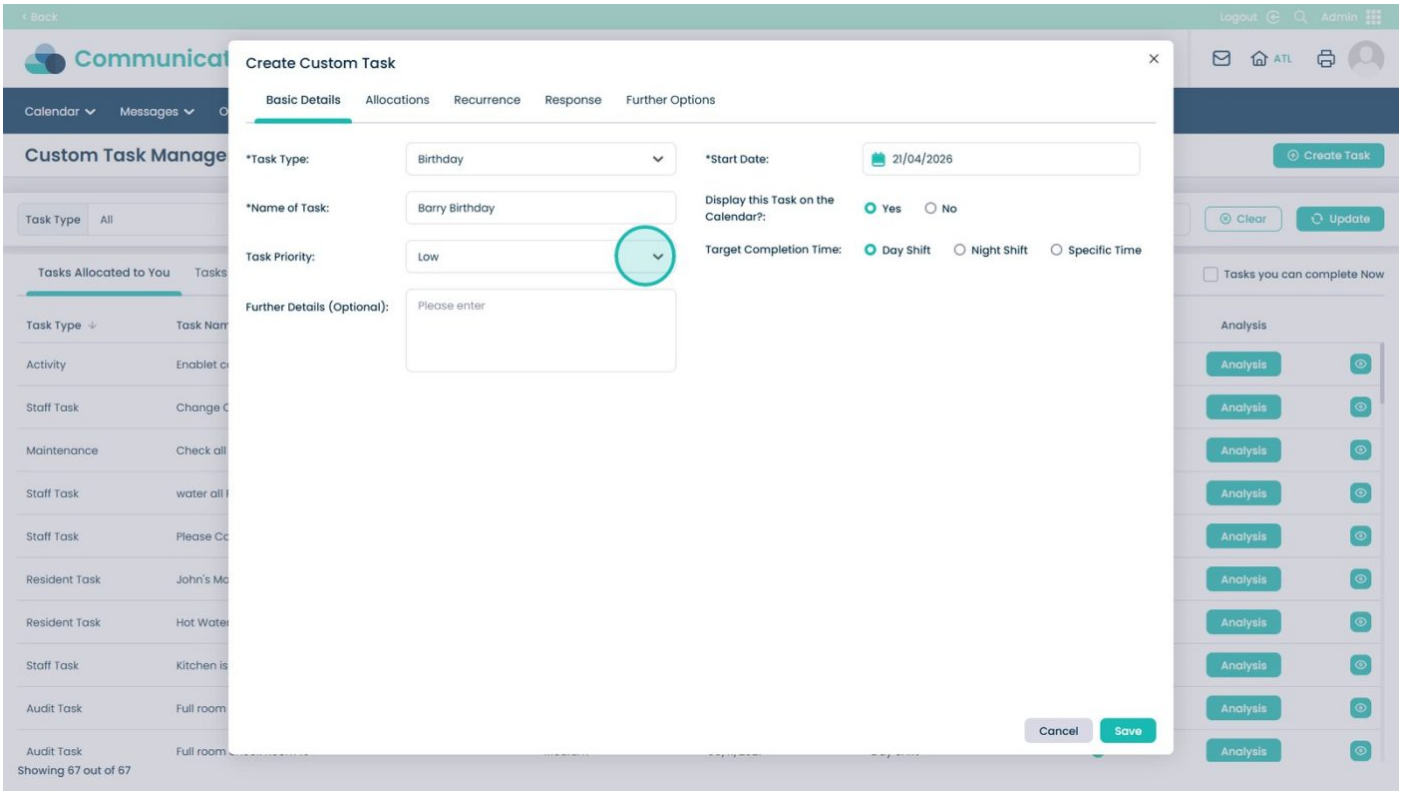
Enter a clear task name to help identify it easily in schedules and lists.



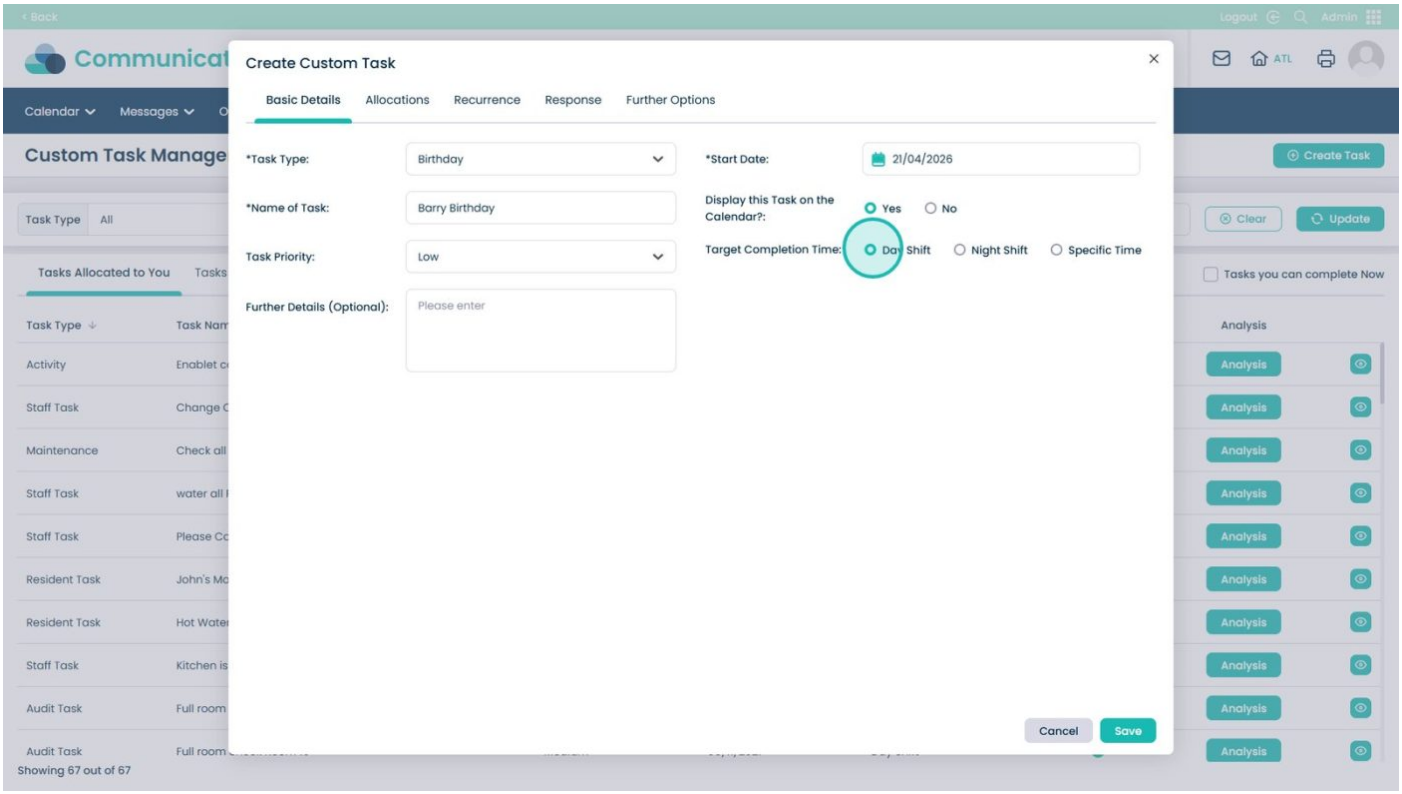
Enable the calendar option to display this task for easier planning.



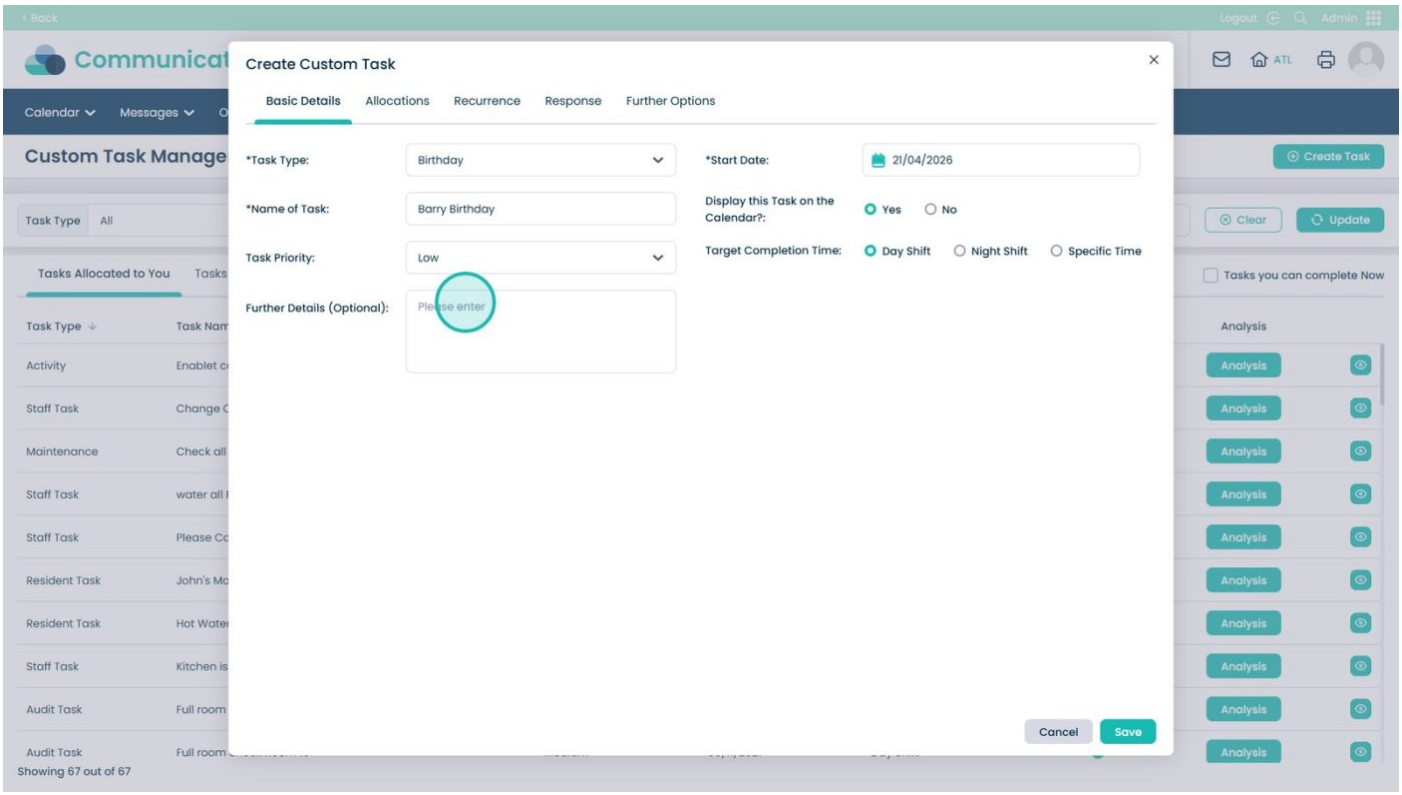
Select a priority level to ensure important tasks are clearly highlighted.



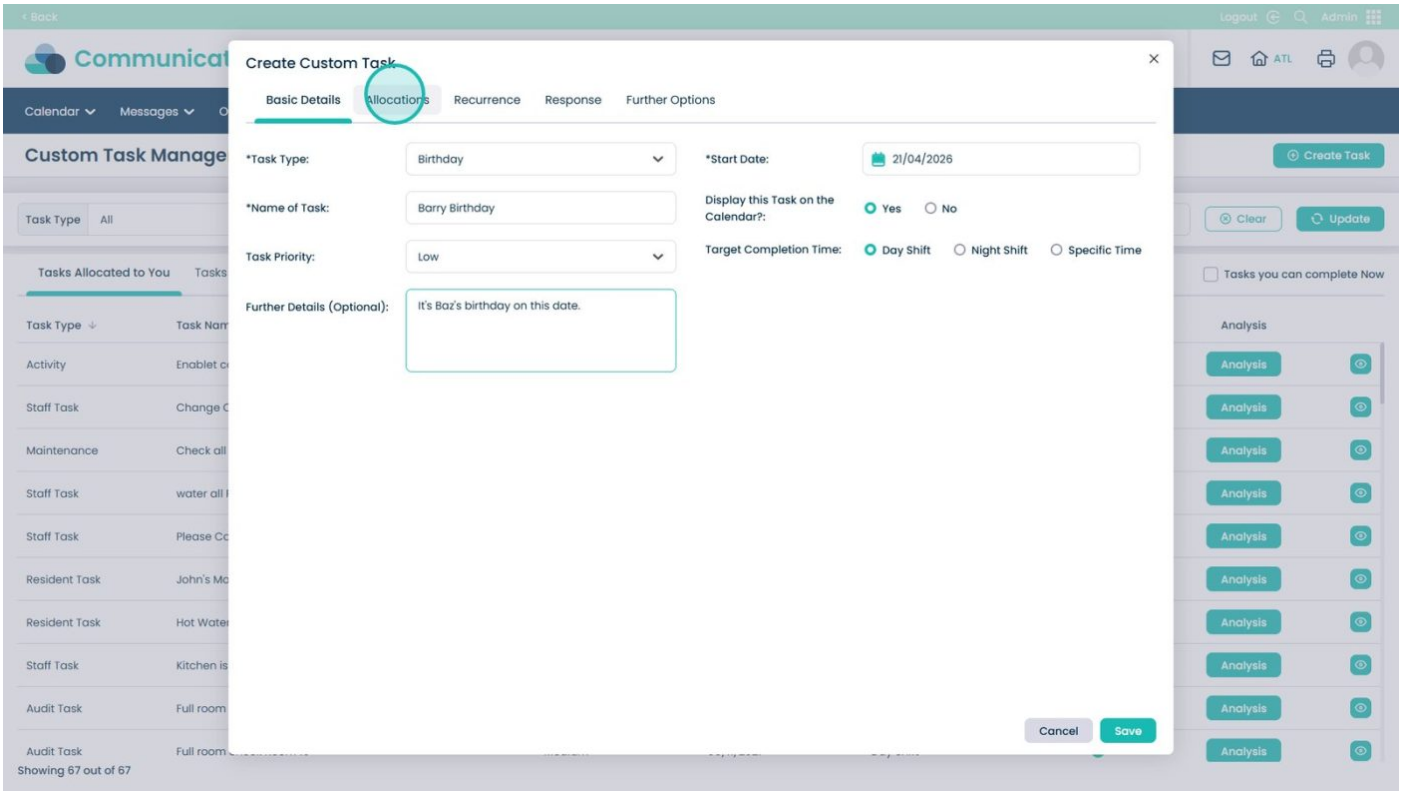
Select the target shift to assign when this task should be completed.



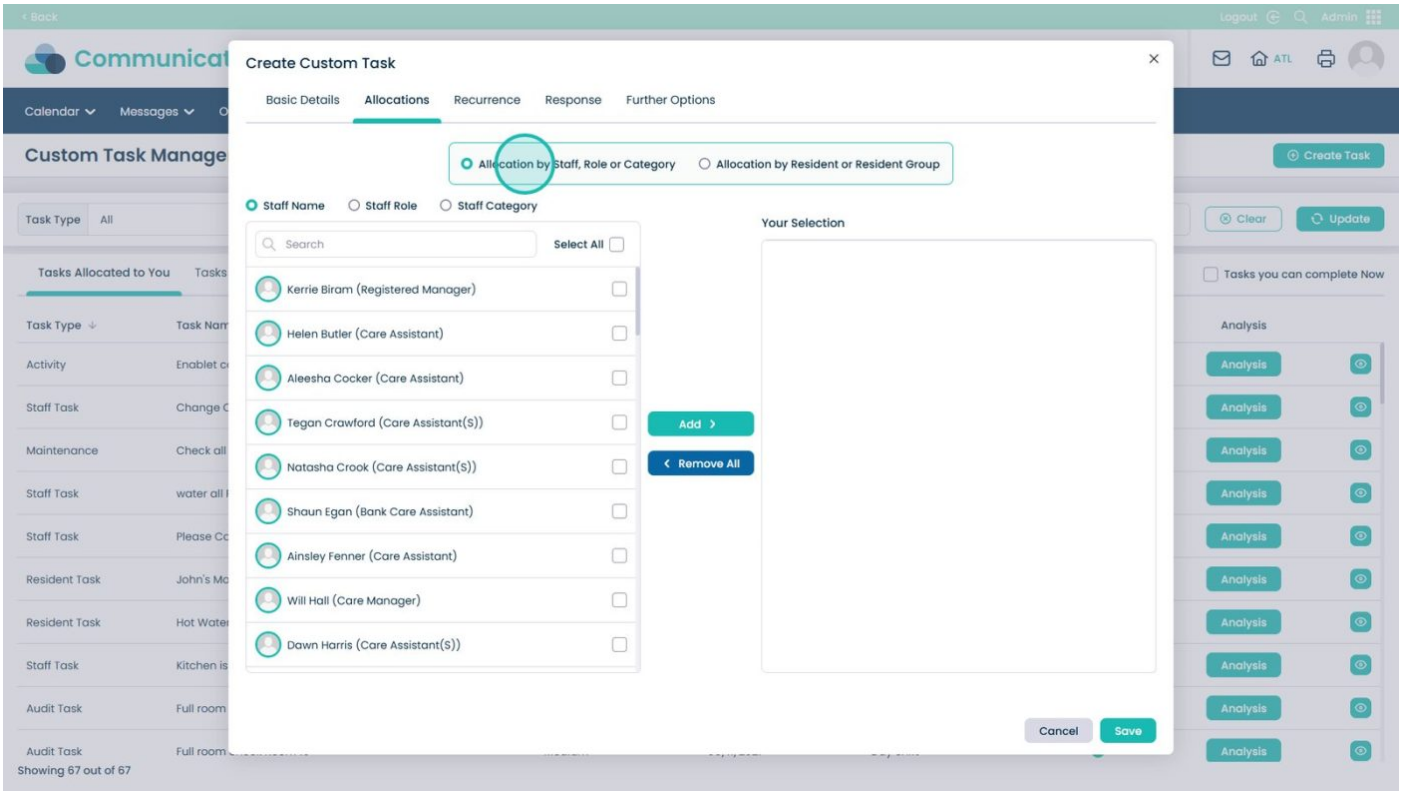
Enter additional information to provide clear instructions for staff.



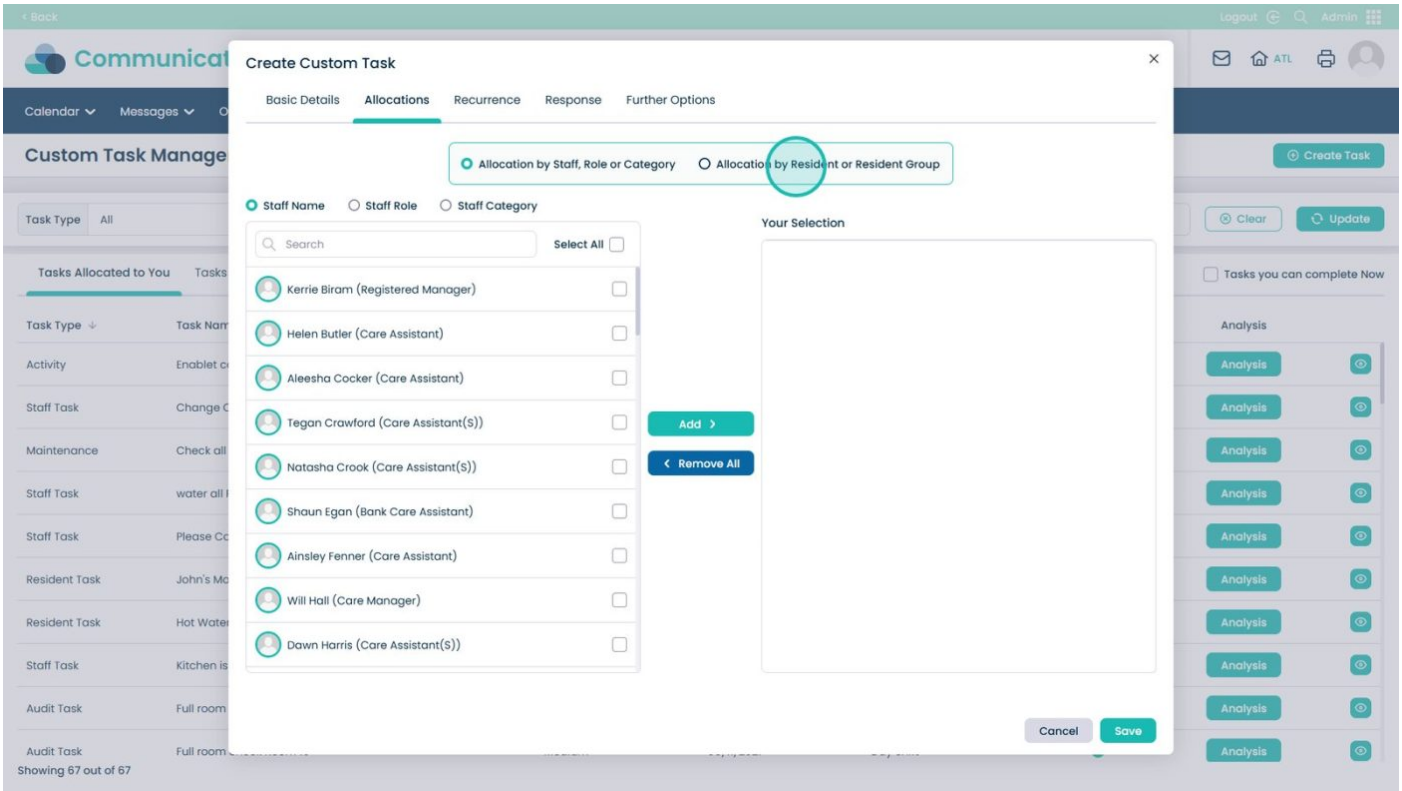
Open the Allocations tab to assign the task appropriately.



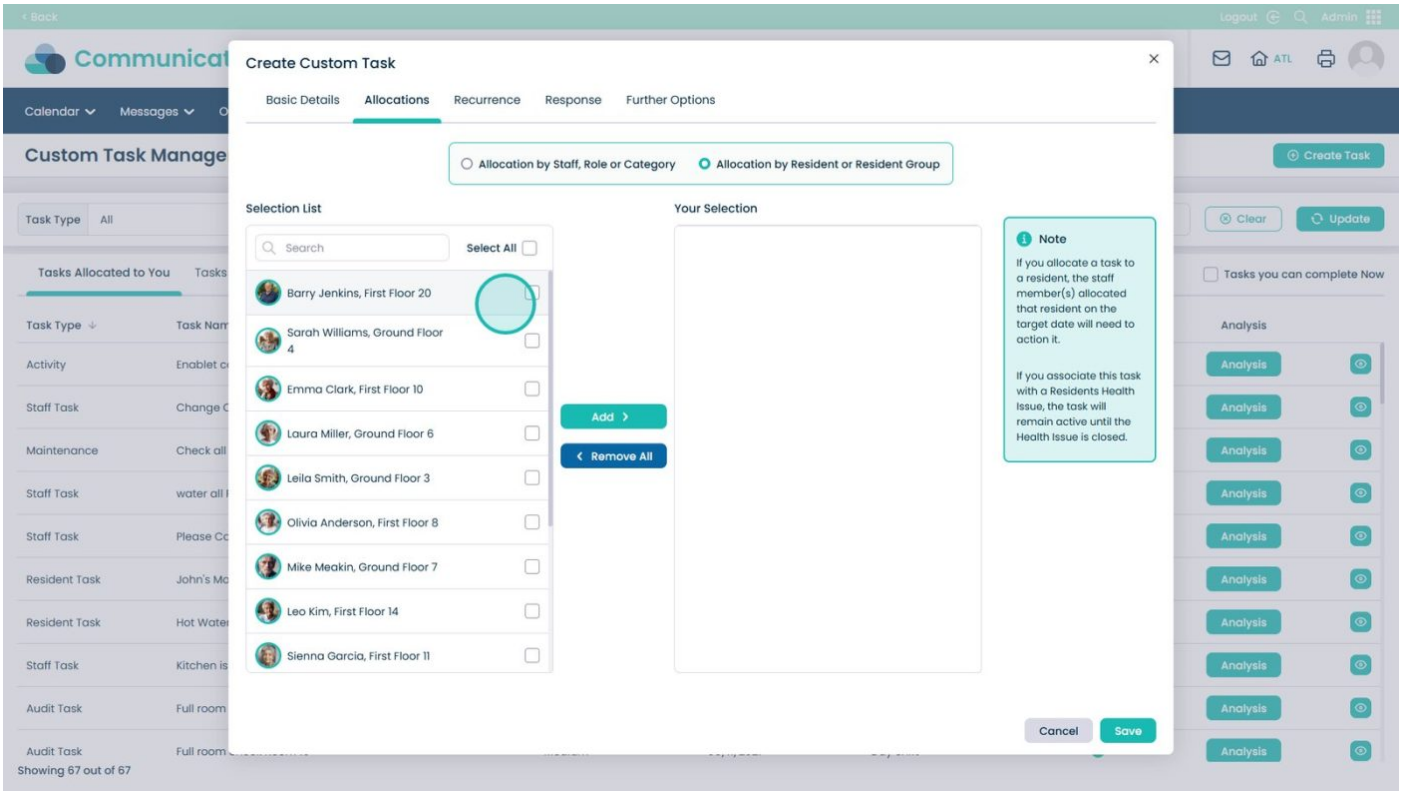
Select an allocation method such as Staff, Role, or Category to assign responsibility.



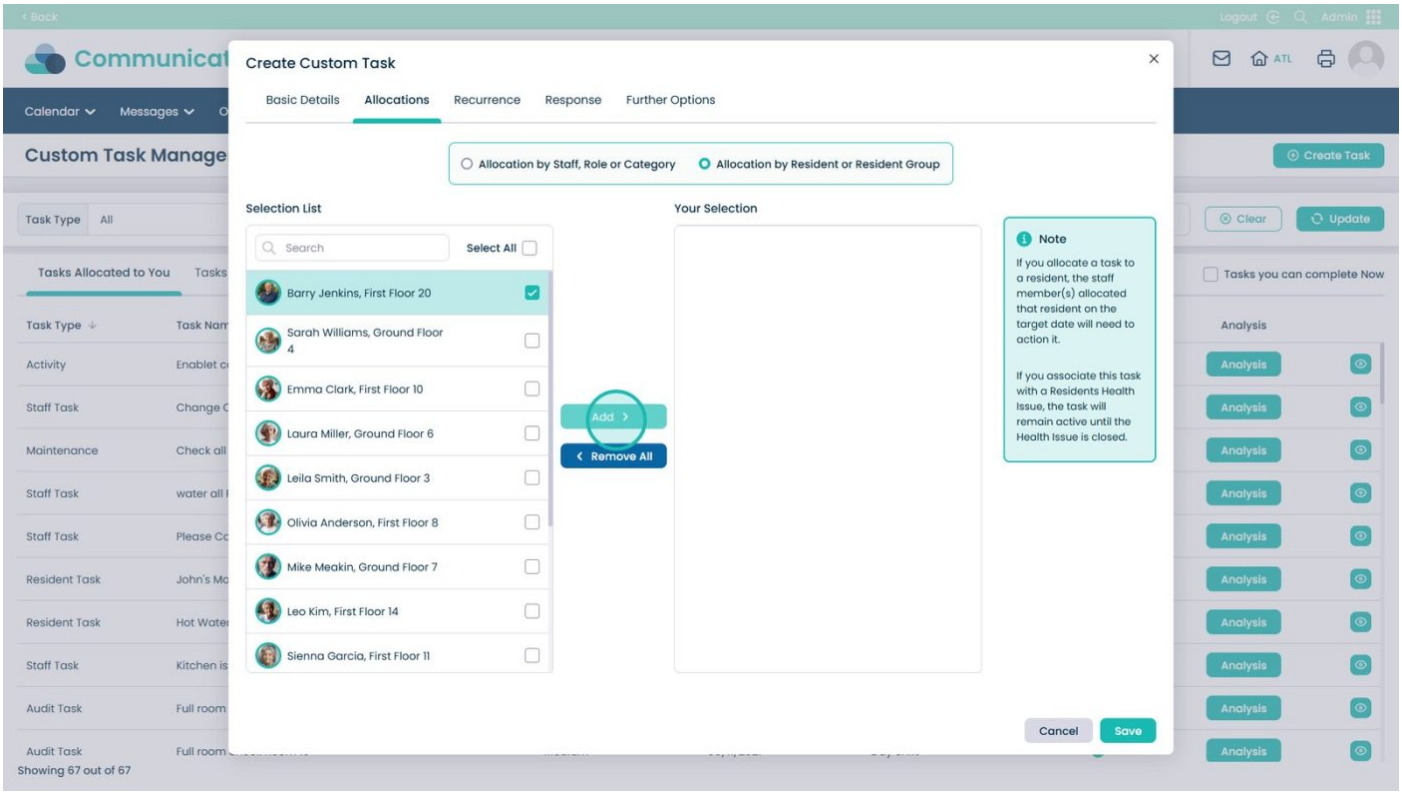
Alternatively, select Resident or Resident Group for a service user-focused allocation.



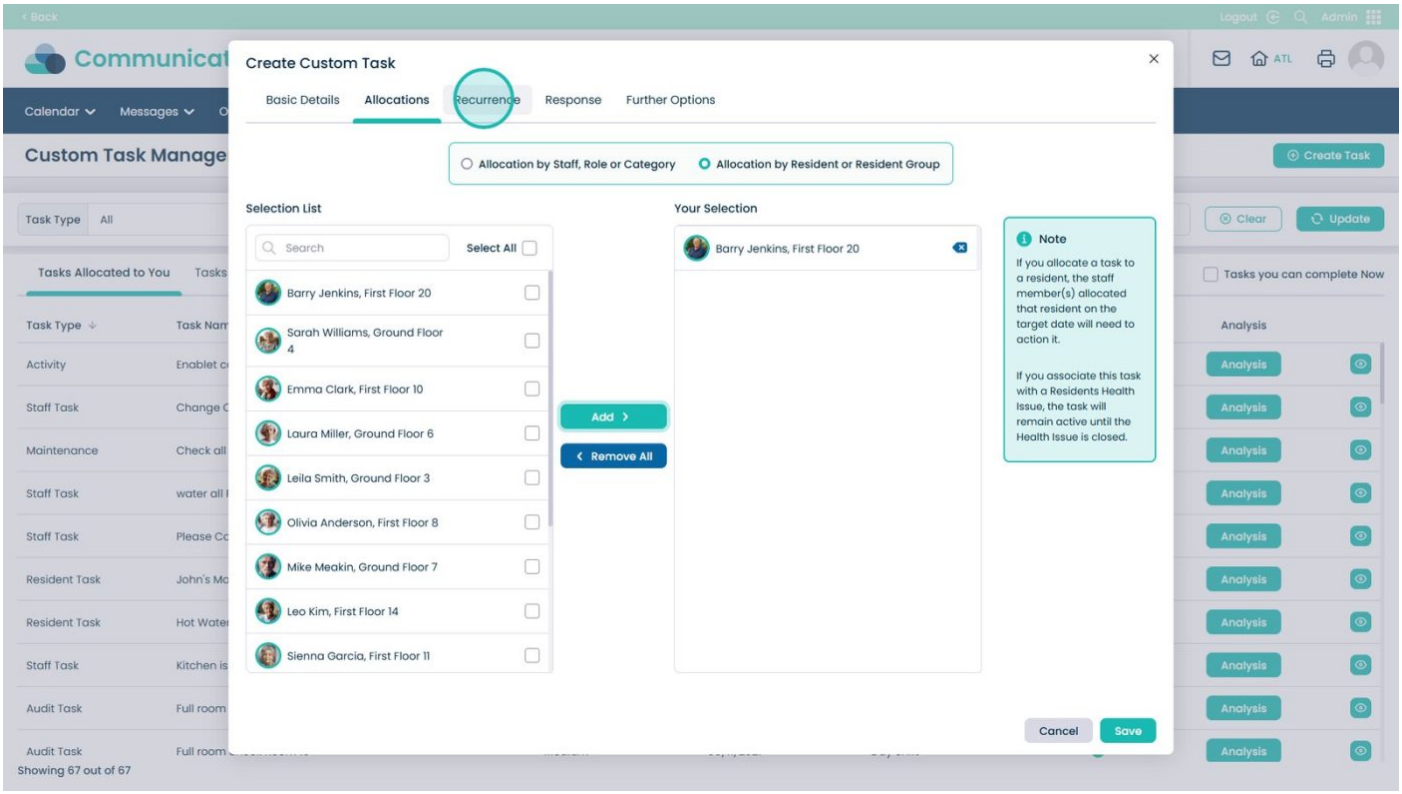
Select the resident to assign this custom task to.



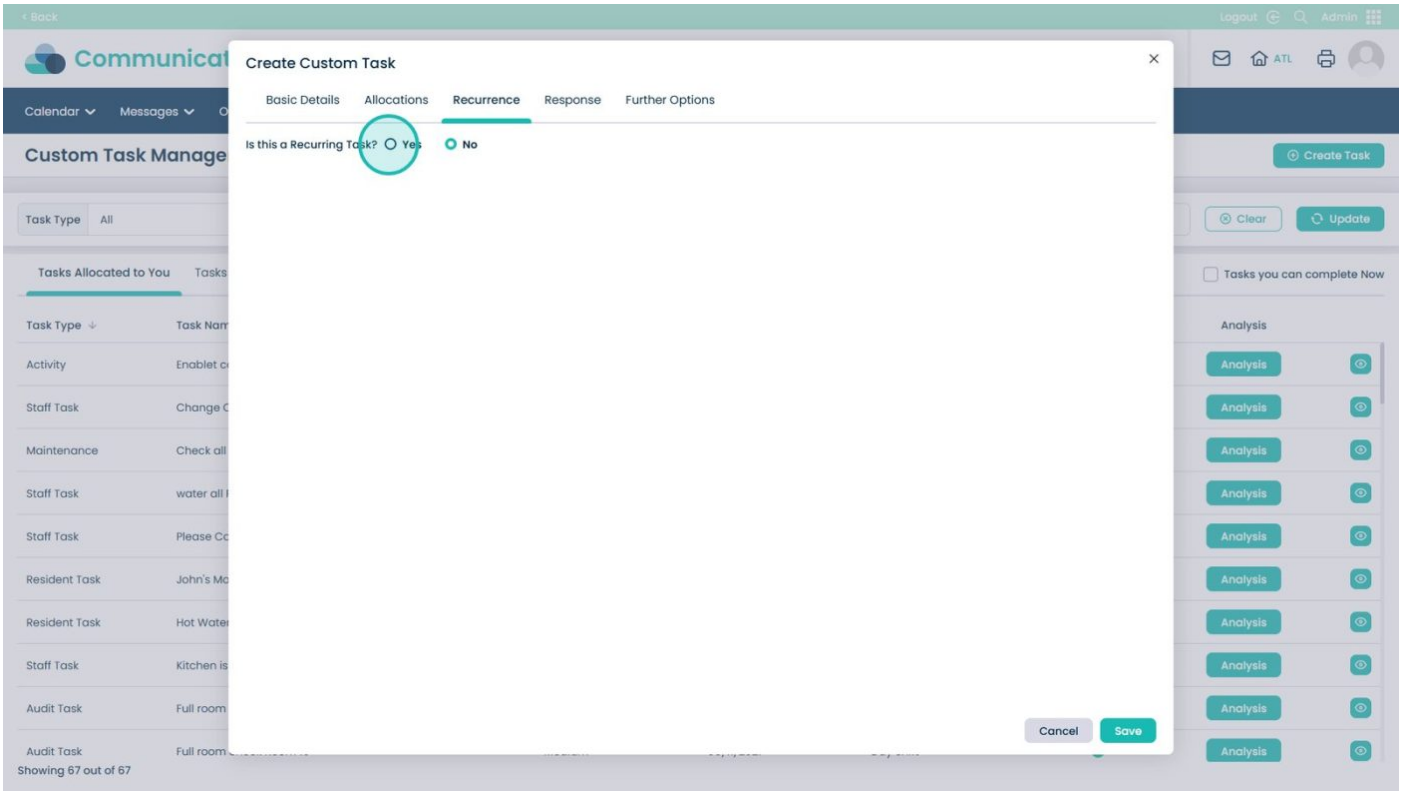
Click Add to confirm and apply the selected assignment.



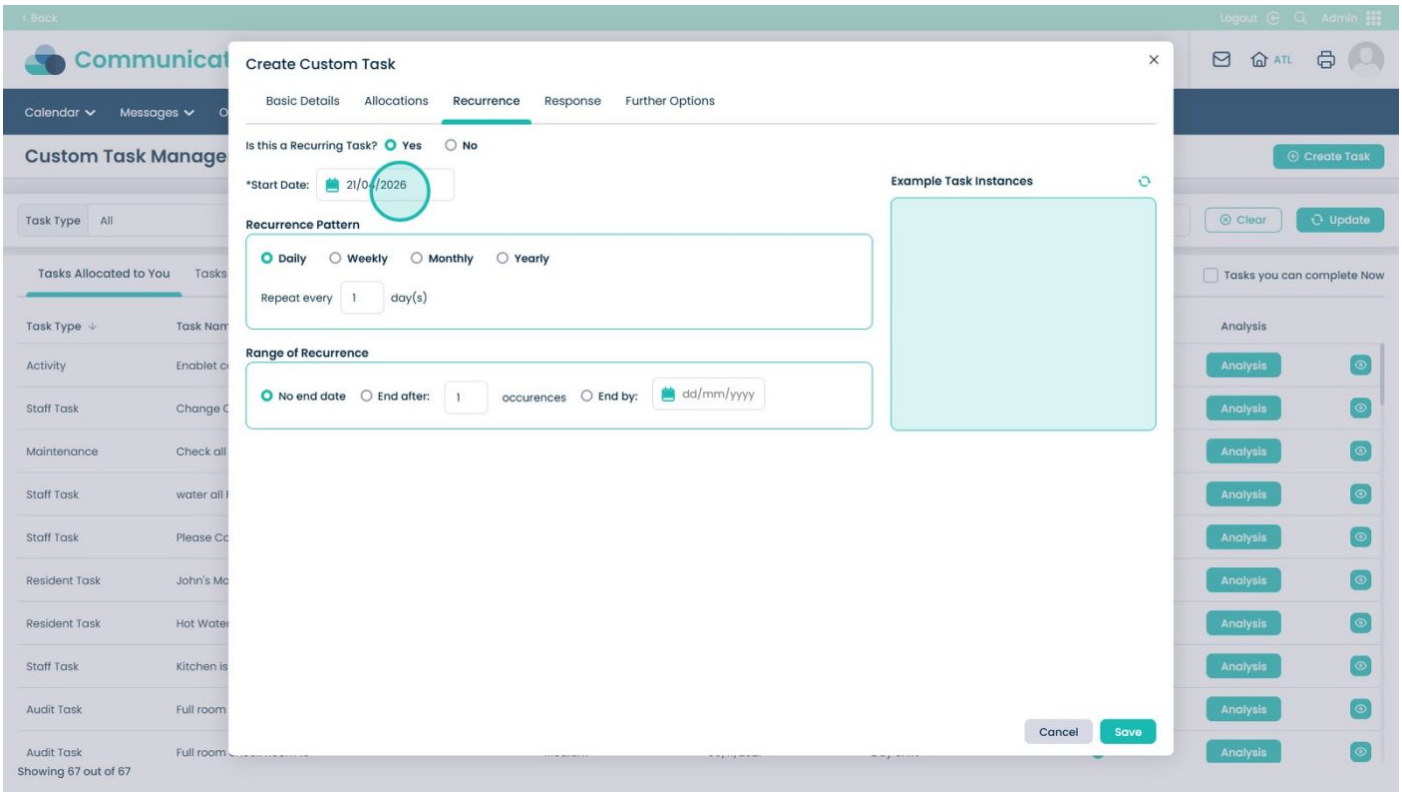
Open the Recurrence tab to configure how often the task repeats.



Enable recurrence to ensure the task repeats automatically.



Select the start date for the recurrence cycle.



Select a recurrence pattern such as Yearly to match the task requirements.

Set a recurrence range if the task should stop after a certain period.

Select No end date to keep the task recurring indefinitely.

Open the Response tab to configure completion requirements.

Enable written responses to capture additional task completion details.

Enable care plan note recording to store responses in resident records.

Enable notifications to send responses to selected staff groups.

Filter staff by category to target notifications more precisely.

Select the staff members to include in the notification group.

Click Add to confirm and include the selected staff in the group.

Enter a custom message to guide staff responses on completion.

Open Further Options to configure additional task settings.

Set the task expiration timeframe to control completion deadlines.

Enable or disable early completion depending on your workflow requirements.

Enable or disable postponing to control whether tasks can be delayed.

Enable non-admin edits to allow broader flexibility in task updates.

Click Save to create and apply your custom task.

Review the created task to ensure all settings have been applied correctly.

Was it helpful ?

- Happy
- Normal
- Sad

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