

redUX (redesign UX • re-do • ,ri:'du:)

Task Screen



Good



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Jun 2023 - Mar 2025

How might we make Tasks more usable and widely adopted?

Background

The task management feature in GoodX was developed some time ago to meet a specific need. However, due to limited integration and usability issues, it has remained stagnant and largely unused by users.

Problem

Due to rapid development, the tool was initially built with only **essential features** and minimal focus on usability.

Now that the core functionality is in place, **enhancing usability** is crucial to boost productivity.

GoodX Web

www.goodx.web.za

GoodX

Switch History

Era Management

Tasks4

Inbox

CRM

Admin Event History

IM

1-D

This is the updated Kanban View for the Task Screen

Logout

Kanban View

List View

Filter

New Task

New Call Event

Other Event...

Search...

Due date from: YYYY-MM-DD to: YYYY-MM-DD

Assignee: Choose...

Priority: Choose...

Status: C

Created by: Choose...

Action: Choose...

Patient: Choose...

Template: Choose...

Display

Auto Dialer

1

...

Change all to "In progress"

Change all to "Done"

Review Test Results

Tomorrow, 08:30 (2024-04-17)

Me (Dr Alex Awesome)

Sophia Patel

Me (Dr Alex Awesome, 2024-09-10, 10:04)

2

...

Me (Dr Alex Awesome...)

Dr Benjamin Smith

Dr Elena Choi

Sr Olivia Tremblay

2

...

Book Procedure

Tomorrow, 15:30 (2024-09-17)

Me (Dr Alex Awesome)

Emily Thompson

THEATER BOOKING

Dr Benjamin Smith

Edit task

Duplicate task

Delete task

Account Details

Clinical Case

Clinical History

1

...

My Tasks

All Tasks

Status

To do

In progress

Done

1

...

Create weekly tasks

Today, 08:30 (2024-09-16)

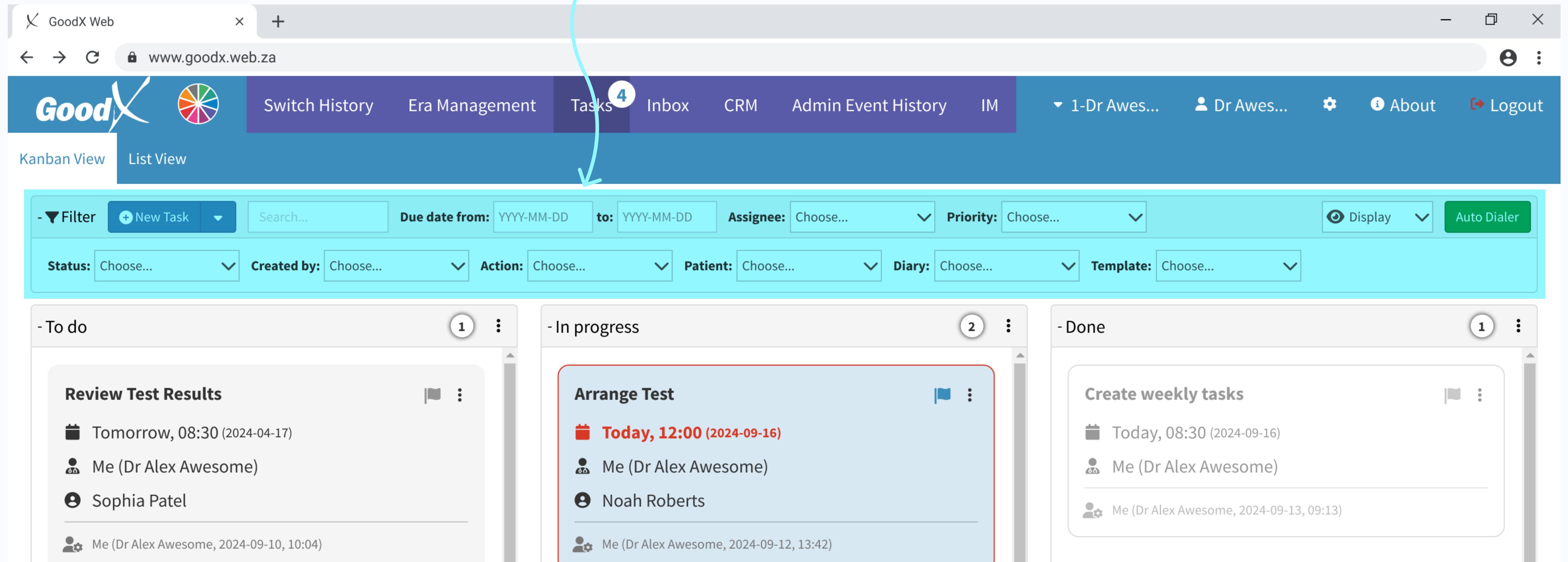
Me (Dr Alex Awesome)

Me (Dr Alex Awesome, 2024-09-13, 09:13)

12:30 PM

Better UX Suggestions

Kanban View cleaned up and **grouped buttons and search boxes into one “toolbar” (accordion)**



Better UX Suggestions

Better default grouping into Status/Stage boards (customisable in Settings) and corresponds to real life task status

Kanban View | List View

- Filter | + New Task | Search... | Due date from: YYYY-MM-DD to: YYYY-MM-DD | Assignee: Choose... | Priority: Choose... | Display | Auto Dialer

Status: Choose... | Created by: Choose... | Action: Choose... | Patient: Choose... | Diary: Choose... | Template: Choose...

- To do (1) | - In progress (2) | - Done (1)

Review Test Results
Tomorrow, 08:30 (2024-04-17)
Me (Dr Alex Awesome)
Sophia Patel

Arrange Test
Today, 12:00 (2024-09-16)
Me (Dr Alex Awesome)
Noah Roberts

Create weekly tasks
Today, 08:30 (2024-09-16)
Me (Dr Alex Awesome)
Me (Dr Alex Awesome, 2024-09-13, 09:13)

Hide tasks older than 7 days (can be changed in Settings)

Tip: don't hide all done tasks. It produces dopamine to see things you've completed.

Zeigarnik Effect
Incomplete tasks weigh on our minds until done

Better UX Suggestions

Improved task card styling, layout and colouring (fields hidden if nothing filled in)
Less task priorities (customisable in Settings)

Low priority

Normal priority

High priority

Urgent priority

Book Procedure

📅 Tomorrow, 15:30 (2024-09-17)

👤 Me (Dr Alex Awesome)

👤 Emily Thompson

⚡ THEATER BOOKING

📄 Dr Benjamin Smith

👤🔧 Dr Benjamin Smith (2024-09-13, 09:13)

Book Procedure

📅 Tomorrow, 15:30 (2024-09-17)

👤 Me (Dr Alex Awesome)

👤 Emily Thompson

⚡ THEATER BOOKING

📄 Dr Benjamin Smith

👤🔧 Dr Benjamin Smith (2024-09-13, 09:13)

Book Procedure

📅 Tomorrow, 15:30 (2024-09-17)

👤 Me (Dr Alex Awesome)

👤 Emily Thompson

⚡ THEATER BOOKING

📄 Dr Benjamin Smith

👤🔧 Dr Benjamin Smith (2024-09-13, 09:13)

Book Procedure

📅 Tomorrow, 15:30 (2024-09-17)

👤 Me (Dr Alex Awesome)

👤 Emily Thompson

⚡ THEATER BOOKING

📄 Dr Benjamin Smith

👤🔧 Dr Benjamin Smith (2024-09-13, 09:13)

Overdue task

Arrange Test

📅 Today, 12:00 (2024-09-16)

👤 Me (Dr Alex Awesome)

👤 Noah Roberts

👤🔧 Me (Dr Alex Awesome, 2024-09-12, 13:42)

Create weekly tasks

📅 Today, 08:30 (2024-09-16)

👤 Me (Dr Alex Awesome)

👤🔧 Me (Dr Alex Awesome, 2024-09-13, 09:13)

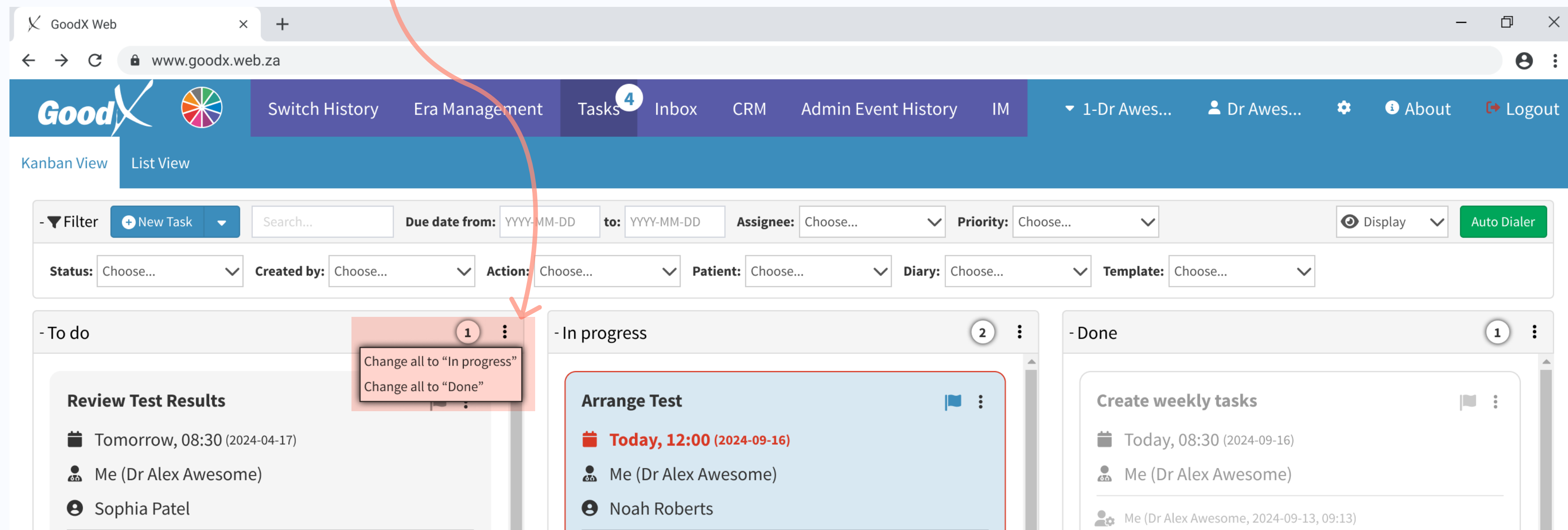
Done task

Limited Choice

We're more likely to decide when the options are sensibly restricted

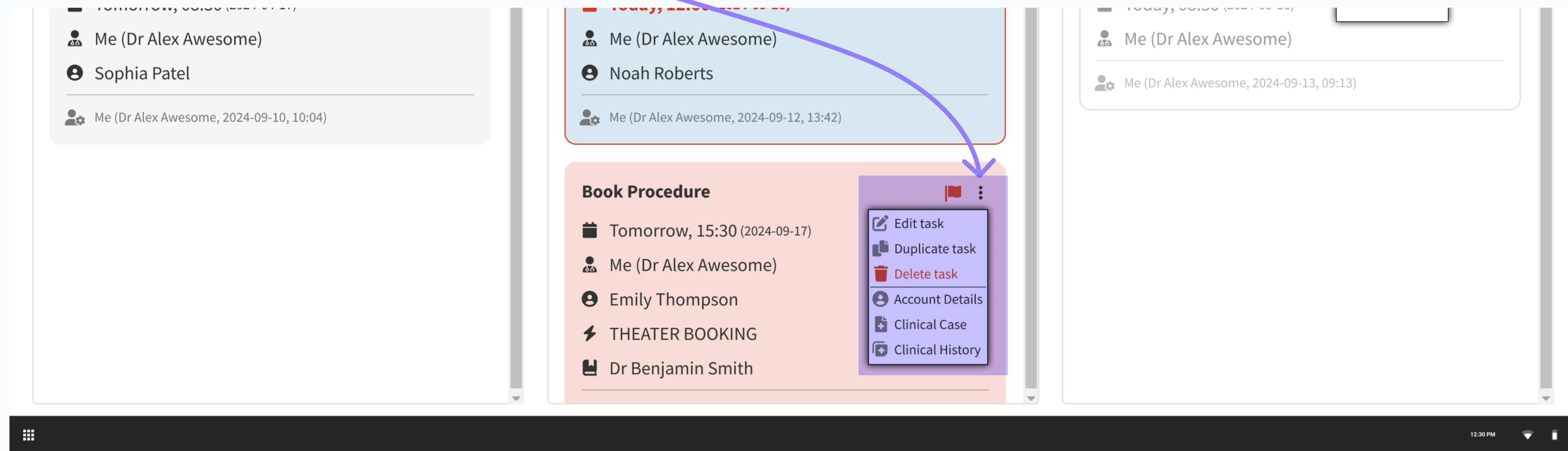
Better UX Suggestions

Easy bulk status change settings on board



Better UX Suggestions

Secondary (less important) functions moved into a separate menu



GoodX Web

www.goodx.web.za

GoodX

Switch History

Era Management

Tasks5

Inbox

CRM

Admin Event History

IM

1-D

Logout

Kanban View

List View

DEFAULT FILTER

Task title

Due before

Assignee Me (Dr Al...)

Update Results

Reset Filters

Priority

Status

Created by

Action

Patient

Diary

Template

Showing 5 results (of 8)

0 selected items

	Status	Task Title	Due	Assignee	Patient/Debtor	Action	Priority
☐	To do	Phone Patient	Fr	Me (Dr Alex Awesome)	Liam Campbell	Call event	
☐	To do	Review Test Results	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		
☐	In progress	Arrange Test	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		
☐	In progress	Book Procedure	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	
☐	Done	Create weekly tasks	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			

Filter options...

☐ Me (Dr Alex Awesome)

☐ Dr Benjamin Smith

☐ Dr Elena Choi

☐ Sr Olivia Tremblay

+ New Task

Select all 5 results

↔

↺

⌵

📄

DEFAULT LAYOUT

<

1

>

Items: 10

Export to PDF

Export to CSV

Auto Dialer

+ New Task

This is the new List View for the Task Screen

Actions

Edit

Duplicate

Delete

Change status to "Done"

Phone Patient

Status: To do

Due date: Friday, 10:00 (2025-03-07)

Assignee: Me (Dr Alex Awesome)

Patient: Liam Campbell

Action: Call event

Diary: Me (Dr Alex Awesome)

Created by: Me (Dr Alex Awesome, 2025-03-03, 11:54)

Account Details

Clinical

Patient File

12:30 PM

Better UX Suggestions

Filter & Search (collapsible) works like it normally does on a List View Screen.

The screenshot shows the GoodX Web application interface. The top navigation bar includes the GoodX logo, a user profile icon, and links for Switch History, Era Management, Tasks (5), Inbox, CRM, Admin Event History, and IM. The right side of the navigation bar shows the user's name (Dr Awes...), a settings icon, and links for About and Logout. Below the navigation bar, there are tabs for Kanban View and List View. The List View tab is active, and a red arrow points from the 'Filter & Search' text to the filter bar. The filter bar is highlighted in light blue and contains various dropdown menus and buttons. A 'Filter options...' dropdown is open, showing a list of assignees. The main table displays 5 tasks with columns for Status, Task Title, Due date, Assignee, Patient/Debtor, Action, and Priority. A right sidebar shows details for a 'Phone Patient' task.

Filter Bar:

- DEFAULT FILTER (dropdown)
- Task title (input field)
- Due before (dropdown)
- Assignee: Me (Dr Al...) (dropdown)
- Update Results (button)
- Reset Filters (button)
- Priority (dropdown)
- Status (dropdown)
- Created by (dropdown)
- Action (dropdown)
- Patient (dropdown)
- Diary (dropdown)
- Template (dropdown)

Filter options...

- ☐ Me (Dr Alex Awesome)
- ☐ Dr Benjamin Smith
- ☐ Dr Elena Choi
- ☐ Sr Olivia Tremblay

Table:

Status	Task Title	Due date	Assignee	Patient/Debtor	Action	Priority
To do	Phone Patient	Friday, 07:00 (2025-03-07)	Me (Dr Alex Awesome)	Liam Campbell	Call event	High
To do	Review Test Results	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		Medium
In progress	Arrange Test	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		Medium
In progress	Book Procedure	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	Medium
Done	Create weekly tasks	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			Medium

Right Sidebar (Phone Patient):

- Status: To do
- Due date: Friday, 10:00 (2025-03-07)
- Assignee: Me (Dr Alex Awesome)
- Patient: Liam Campbell
- Action: Call event
- Diary: Me (Dr Alex Awesome)
- Created by: Me (Dr Alex Awesome, 2025-03-03, 11:54)

Better UX Suggestions

Status/Stage grouping happens in a column (for now) and corresponds to real life task status. Fields are always first sorted by status, then by due date.

The screenshot displays the GoodX Web application interface. The top navigation bar includes links for Switch History, Era Management, Tasks (5), Inbox, CRM, Admin Event History, and IM. The user is logged in as Dr. Alex Awesome. The interface is in List View, showing a table of tasks. A pink box highlights the 'Status' filter dropdown, which is open, showing options: To do, In progress, and Done. The task list is sorted by status and then by due date. The right sidebar shows details for a selected task, 'Phone Patient'.

Status	Task Title	Due before	Assignee	Patient/Debtor	Action	Priority
To do	Phone Patient	Friday, 10:00 (2025-03-07)	Me (Dr Alex Awesome)	Liam Campbell	Call event	High
To do	Review Test Results	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		Medium
In progress	Arrange Test	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		Medium
In progress	Book Procedure	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	Medium
Done	Create weekly tasks	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			Medium

Phone Patient

- Status: To do
- Due date: Friday, 10:00 (2025-03-07)
- Assignee: Me (Dr Alex Awesome)
- Patient: Liam Campbell
- Action: Call event
- Diary: Me (Dr Alex Awesome)
- Created by: Me (Dr Alex Awesome, 2025-03-03, 11:54)

Better UX Suggestions

Task line colouring quickly indicates priority.

The screenshot displays the GoodX Web application interface. The top navigation bar includes links for Switch History, Era Management, Tasks (with a notification badge '5'), Inbox, CRM, Admin, Event History, and IM. The user profile '1-Dr Awes...' is visible. Below the navigation bar, the 'List View' tab is selected. The main content area shows a task list with columns for Task title, Due date, Assignee, Patient/Debtor, Action, and Priority. The tasks are color-coded by priority: Low (light blue), Normal (medium blue), High (orange), and Urgent (red). A dropdown menu for the Priority filter is open, showing options: Low, Normal, High, and Urgent. The task list includes tasks like 'Review Test Results', 'Arrange Test', 'Book Procedure', and 'Create weekly tasks'. A sidebar on the right shows the 'Actions' panel with buttons for Edit, Duplicate, and Delete, and a 'Change status to Done' button. The 'Phone Patient' section displays details for the selected task.

Task title	Due date	Assignee	Patient/Debtor	Action	Priority
Review Test Results	Friday, 10:00 (2025-03-07)	Me (Dr Alex Awesome)	Liam Campbell	Call event	Low
Arrange Test	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		Normal
Book Procedure	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		High
Create weekly tasks	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	Urgent
	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			Low

Better UX Suggestions

Using the sidebar as a “quick view” & additional actions for the task (collapsible).

The interface shows a task list with filters and a sidebar for task details. A blue arrow points from the text 'Using the sidebar as a “quick view” & additional actions for the task (collapsible)' to the sidebar.

Filters: DEFAULT FILTER, Task title, Due before, Assignee: Me (Dr Alex Awesome), Update Results, Reset Filters.

Table Headers: Status, Task Title, Due date, Assignee, Patient/Debtor, Action, Priority.

Table Data:

Status	Task Title	Due date	Assignee	Patient/Debtor	Action	Priority
To do	Phone Patient	Friday, 10:00 (2025-03-07)	Me (Dr Alex Awesome)	Liam Campbell	Call event	High
To do	Review Test Results	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		Medium
In progress	Arrange Test	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		Medium
In progress	Book Procedure	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	Low
Done	Create weekly tasks	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			Medium

Actions: Edit, Duplicate, Delete, Change status to “Done”.

Phone Patient Details:

- Status: To do
- Due date: Friday, 10:00 (2025-03-07)
- Assignee: Me (Dr Alex Awesome)
- Patient: Liam Campbell
- Action: Call event
- Diary: Me (Dr Alex Awesome)
- Created by: Me (Dr Alex Awesome, 2025-03-03, 11:54)

Footer: Account Details, Clinical, Patient File.

Better UX Suggestions

Overdue tasks are made visible and prominent with **bold red text**.

The screenshot displays the GoodX Web application interface. The top navigation bar includes the GoodX logo, a color wheel icon, and links for Switch History, Era Management, Tasks (with a notification badge '5'), Inbox, CRM, Admin Event History, and IM. The user profile '1-Dr Awes...' is visible on the right. Below the navigation bar, there are tabs for Kanban View and List View. The main content area shows a list of tasks with filters for Task title, Due before, Assignee, Priority, Status, Created by, Action, Patient, Diary, and Template. The task list shows 5 results (of 8) with 0 selected items. The task 'Arrange Test' is highlighted with a red box and bold red text in the Due date column, indicating it is overdue. The right sidebar shows the details for the selected task, 'Phone Patient', including Status (To do), Due date (Friday, 10:00 (2025-03-07)), Assignee (Me (Dr Alex Awesome)), Patient (Liam Campbell), Action (Call event), Diary (Me (Dr Alex Awesome)), and Created by (Me (Dr Alex Awesome, 2025-03-03, 11:54)).

Status	Task Title	Due date	Assignee	Patient/Debtor	Action	Priority
To do	Phone Patient	Friday, 10:00 (2025-03-07)	Me (Dr Alex Awesome)	Liam Campbell	Call event	High
To do	Review Test Results	Tomorrow, 08:30 (2025-03-04)	Me (Dr Alex Awesome)	Sophia Patel		Medium
In progress	Arrange Test	Today, 12:00 (2025-03-03)	Me (Dr Alex Awesome)	Noah Roberts		Medium
In progress	Book Procedure	Tomorrow, 15:30 (2025-03-04)	Me (Dr Alex Awesome)	Emily Thompson	Theater booking	Medium
Done	Create weekly tasks	Today, 08:30 (2025-03-03)	Me (Dr Alex Awesome)			Medium

GoodX Web

www.goodx.web.za

GoodX

TASK - Workflow Event

Logout

Kanban View

List View

DEFAULT FILTER

Priority

Showing 5 results (of 8)

0 selected

Status	Task Title
☐ To do	Phone Pati
☐ To do	Review Tes
☐ In progress	Arrange Tes
☐ In progress	Book Proce
☐ Done	Create wee

TASK ITEM

- Request

Title *

Type your task title here...

Due date *

Today (2025-03-03)

Time *

12:00

Priority

Low

Normal

High

Urgent

Assignee(s)

Assign a user to this task...

Assign to self

☒ Hide GoodX Users

Description

B

I

U

S

- Feedback

Close

History

Save

<

1

>

Items: 10

Export to PDF

Export to CSV

Auto Dialer

New Task

Account Details

Clinical

Patient File

This is the updated New Task screen for Tasks

Better UX Suggestions

Simplified layout & structure

TASK - Workflow Event

TASK

- Request

Title *

Type your task title here...

Due date *

Today (2025-03-03)

Time *

12:00

Priority

Low

Normal

High

Urgent

Assignee(s)

Assign a user to this task...

Assign to self

Me (Dr Alex Awesome)

Description

Patient

Search patients...

Action

Select an event...

Diary

Select a diary...

Status

To do (default)

- Feedback

Feedback

Lock

Email

Print

Collapse All

Close

History

Save

GoodX

16

Better UX Suggestions

Better **order & grouping**. Clear indications of required fields *

Required
basics of task

Assignee
lookup

Other fields

TASK - Workflow Event

TASK

- Request

Title *	Type your task title here...		
Due date *	Today (2025-03-03)	Time *	12:00
Priority	☐ Low ☒ Normal ☐ High ☐ Urgent		
Assignee(s)	Assign a user to this task... ☒ Hide GoodX Users Assign to self		
	Me (Dr Alex Awesome) x		

Description

- Feedback

Feedback



Chunking

People remember grouped information better



Better UX Suggestions

Description & feedback text fields with **minimal editing controls** (bold, italic, list, etc.)
Level it up with **voice-to-text** functionality.

The screenshot shows a 'TASK - Workflow Event' form. The form is divided into several sections: 'Request', 'Description', and 'Feedback'. The 'Request' section contains fields for 'Title', 'Due date', 'Time', 'Priority', 'Assignee(s)', 'Patient', 'Action', 'Diary', and 'Status'. The 'Description' and 'Feedback' sections each have a text area with minimal editing controls (bold, italic, underline, strikethrough, bulleted list, numbered list) and an 'Add Voice Recording' button. Green annotations highlight these sections and the 'Add Voice Recording' buttons. A green arrow points from the 'voice-to-text' text in the main text to the 'Add Voice Recording' button in the 'Description' section. Another green arrow points from the 'minimal editing controls' text to the editing controls in the 'Description' section. A third green arrow points from the 'voice-to-text' text to the 'Add Voice Recording' button in the 'Feedback' section. The form also includes a 'Close' button at the bottom left, and 'History' and 'Save' buttons at the bottom right.

Better UX Suggestions

Remove/hide “complete” checkbox - VERY confusing in this context (*evidence-based suggestion*)

The screenshot shows a web form titled "TASK - Workflow Event". At the top, there is a blue header bar with the word "TASK" and a dropdown arrow. Below this, a red arrow points to a "complete" checkbox, which is crossed out with a red 'X'. The form is divided into several sections:

- Request**: Contains fields for Title (with a red asterisk), Due date (Today (2025-03-03)), Time (12:00), Priority (Low, Normal, High, Urgent), Assignee(s) (with a dropdown and "Assign to self" button), Patient (Search patients...), Action (Select an event...), Diary (Select a diary...), and Status (To do (default)).
- Feedback**: Contains a feedback text area with a rich text editor toolbar.

At the bottom of the form, there are buttons for Lock, Email, Print, and Collapse All. A red "Close" button is at the bottom left, and "History" and "Save" buttons are at the bottom right.



Hick's Law
More options leads to harder decisions



List of suggested changes

Kanban

1. Kanban View cleaned up and grouped buttons and search boxes into one “toolbar” (accordion)
2. Better default grouping into Status/Stage boards (customisable in Settings) and corresponds to real life task status
3. Improved task card styling, layout and colouring (fields hidden if nothing filled in)
4. Easy bulk status change settings on board
5. Secondary (less important) functions moved into a separate menu

List of suggested changes

List

1. Filter & Search (collapsible) works like it normally does on a List View Screen.
2. Status/Stage grouping happens in a column (for now) and corresponds to real life task status. Fields are always first sorted by status, then by due date.
3. Task line colouring quickly indicates priority.
4. Using the sidebar as a “quick view” & additional actions for the task (collapsible).
5. Overdue tasks are made visible and prominent with bold red text.

List of suggested changes

New Task

1. Simplified layout & structure
2. Better order & grouping. Clear indications of required fields *
3. Description & feedback text fields with minimal editing controls (bold, italic, list, etc.). Level it up with voice-to-text functionality.
4. Remove/hide “complete” checkbox - VERY confusing in this context (*evidence-based suggestion*)

Additional Better UX Suggestions

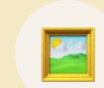
1. Use **icons** to simplify task cards, but keep **hover tooltips** for clarity.



 **Curiosity Gap**
Users have a desire to seek out missing information 

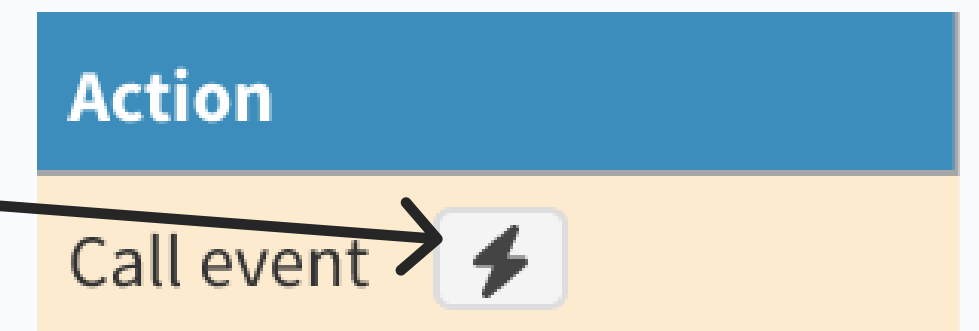
2. **Hide fields that are empty** for lower cognitive load.

 **Cognitive Load**
Total amount of mental effort that is required to complete a task 

 **Framing**
The way information is presented affects how users make decisions 

Questions that need answers - will determine some functionality

1. How many assignees allowed per task? → Multiple
2. If multiple assignees allowed per task, allow more than one diary per task? → Yes
3. Where will task notifications be sent/shown? → Minimizer (smudge)
4. Can action buttons be embedded in a list view cell?



Suggested Implementation Phases

Phase 1

- Layout & styling improvements on Kanban & New Task
- List View
- Notifications (to show where?)

Notifications

Trigger event	Status change	Recipient	Me (Dr Alex Awesome)
Timing	Once-off	10	minutes

Add notification

Phase 2

- Reminders (like in Google Calendar)

Reminders

Trigger event	Status change	Recipient	Me (Dr Alex Awesome)									
Timing	Repeating	Occurs	Daily	every	10	minutes	on	Mon ✓	Tue ?	Wed ✓	Thu ?	Fri ?

+ Add reminder

Click below to see interactive Prototype

Task Screen Prototype