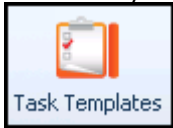


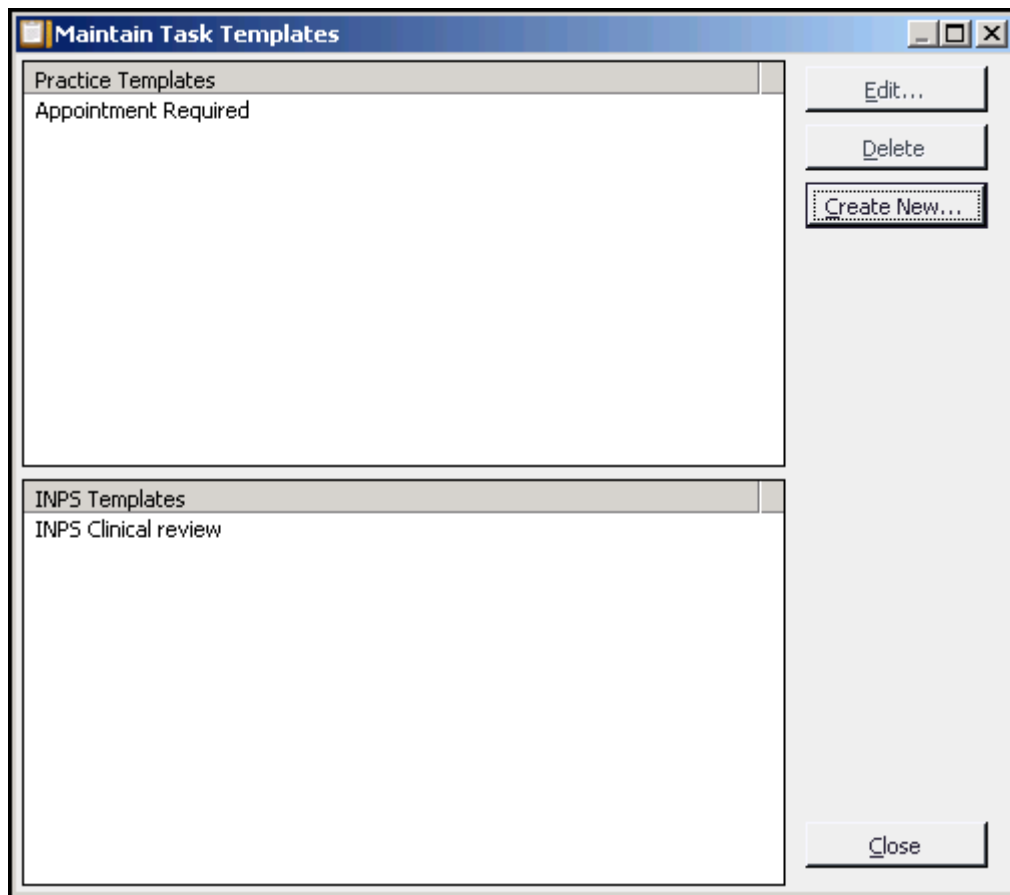
Task Templates

Many tasks have certain things in common, for example, Make an urgent appointment always has a patient attached, always has an Urgent priority, and may always be assigned to the same staff group. **Task Templates**



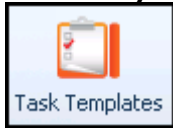
are therefore available for selection when creating a task to speed up the entry of more common tasks. There are two types of Task Template:

- **Practice Templates** - These can be created, edited and deleted by anybody.
- **INPS Templates** - These are created by the system, certain aspects are available for editing depending on the template:



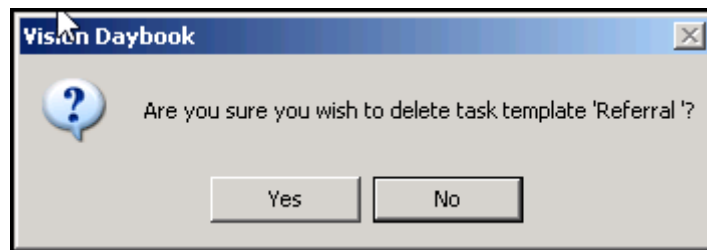
To create or maintain **Task Templates**:

1. From **Daybook**, select the **Maintenance** tab and select **Task Templates**



2. Select the action you require:


- **Create New** - Select to add a new practice template, see [Adding a New Task Template](#) on page 3 for details.
- **Edit** - Select to change an existing template, select the template and then select **Edit**. Change details as required and then select **Finish** to save and close.
- **Delete** - Select to delete an existing template, select the template and then select **Delete**. Select **Yes** to the confirmation message:



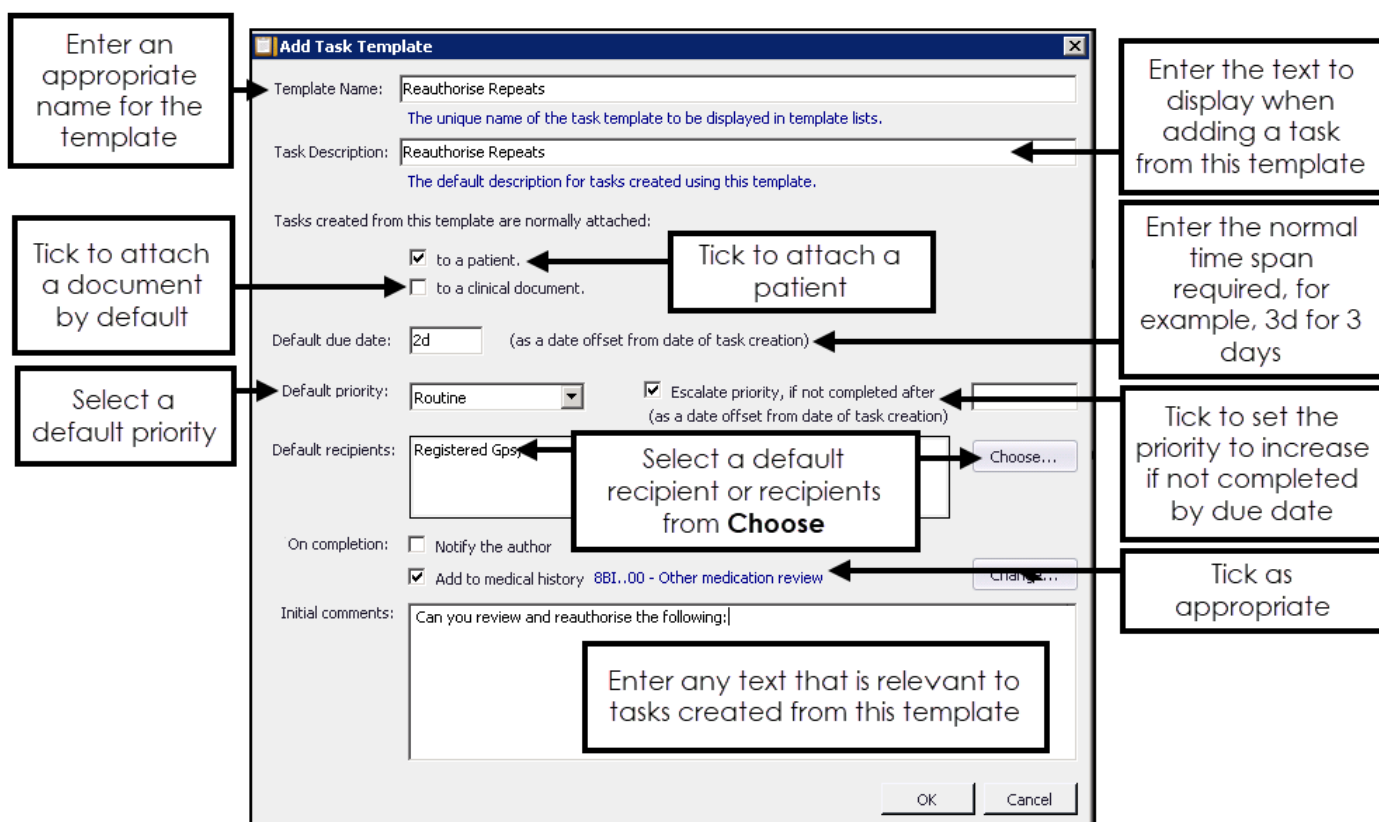
Note- You cannot delete system created templates.

Adding a New Task Template

To add a new task template to **Daybook**:

 **Note** - Check there is not already a template for this task, **Daybook** does not check for duplicates.

1. From **Daybook**, select **Task Template** .
2. Select **Create New**  and the **Add Task Template** screen displays:



The screenshot shows the 'Add Task Template' dialog box with the following fields and annotations:

- Template Name:** Reauthorise Repeats. Annotation: Enter an appropriate name for the template.
- Task Description:** Reauthorise Repeats. Annotation: Enter the text to display when adding a task from this template.
- Tasks created from this template are normally attached:**
 - ☒ to a patient. Annotation: Tick to attach a patient.
 - ☐ to a clinical document. Annotation: Tick to attach a document by default.
- Default due date:** 2d (as a date offset from date of task creation). Annotation: Enter the normal time span required, for example, 3d for 3 days.
- Default priority:** Routine. Annotation: Select a default priority.
- Escalate priority, if not completed after:** (as a date offset from date of task creation). Annotation: Tick to set the priority to increase if not completed by due date.
- Default recipients:** Registered Gps. Annotation: Select a default recipient or recipients from Choose.
- On completion:**
 - ☐ Notify the author.
 - ☒ Add to medical history 881..00 - Other medication review. Annotation: Tick as appropriate.
- Initial comments:** Can you review and reauthorise the following:|. Annotation: Enter any text that is relevant to tasks created from this template.

Buttons: OK, Cancel.

3. Complete the template with as much information as you can, use the comments on the form for completion guidance:

- **Template Name** – Enter a name for the template.
- **Task Description** – Describe the task being requested, this text displays when adding a task from the template list.
- **Tasks created from this template are normally attached:**
 - **to a patient** - Tick if this task should be attached to a patient.
 - **to a clinical document** - Tick if you require a document to be attached to this task.
- **Default due date** - Enter the normal time span required, for example 3d for 3 days, 1w for 1 week.
- **Default priority** - Select **Routine**, **Urgent** or **Low** priority from the list.
- **Escalate priority, if not completed after** - Check to set the priority of a task to increase if not completed by the date offset entered.
- **Default recipients**- Staff can be selected by typing their initial letter as well as by selecting **Choose**.



Remember - Staff Groups are set up from **Control Panel**.

- **On completion:**
 - **Notify the author** - Tick if you want a notification to be automatically created.
 - **Add to medical history** - Tick if required. A **Read Dictionary** screen displays. Select the Read code you require and select **OK** to save and close.



Note - Any Read code entered here is recorded to the patient's record and should therefore be accurate and QOF appropriate.

- **Initial comments** - Enter any text that is relevant.

4. Select **OK** to save and close.