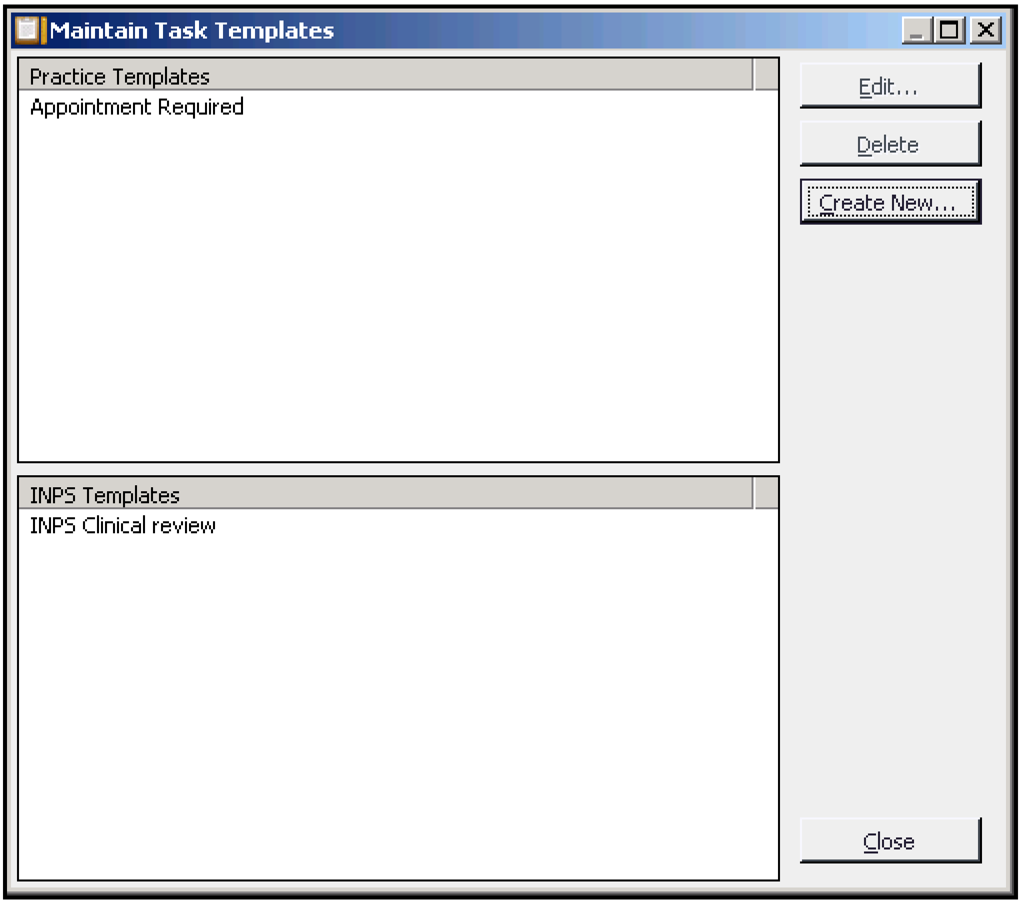
Task Templates

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** 

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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.

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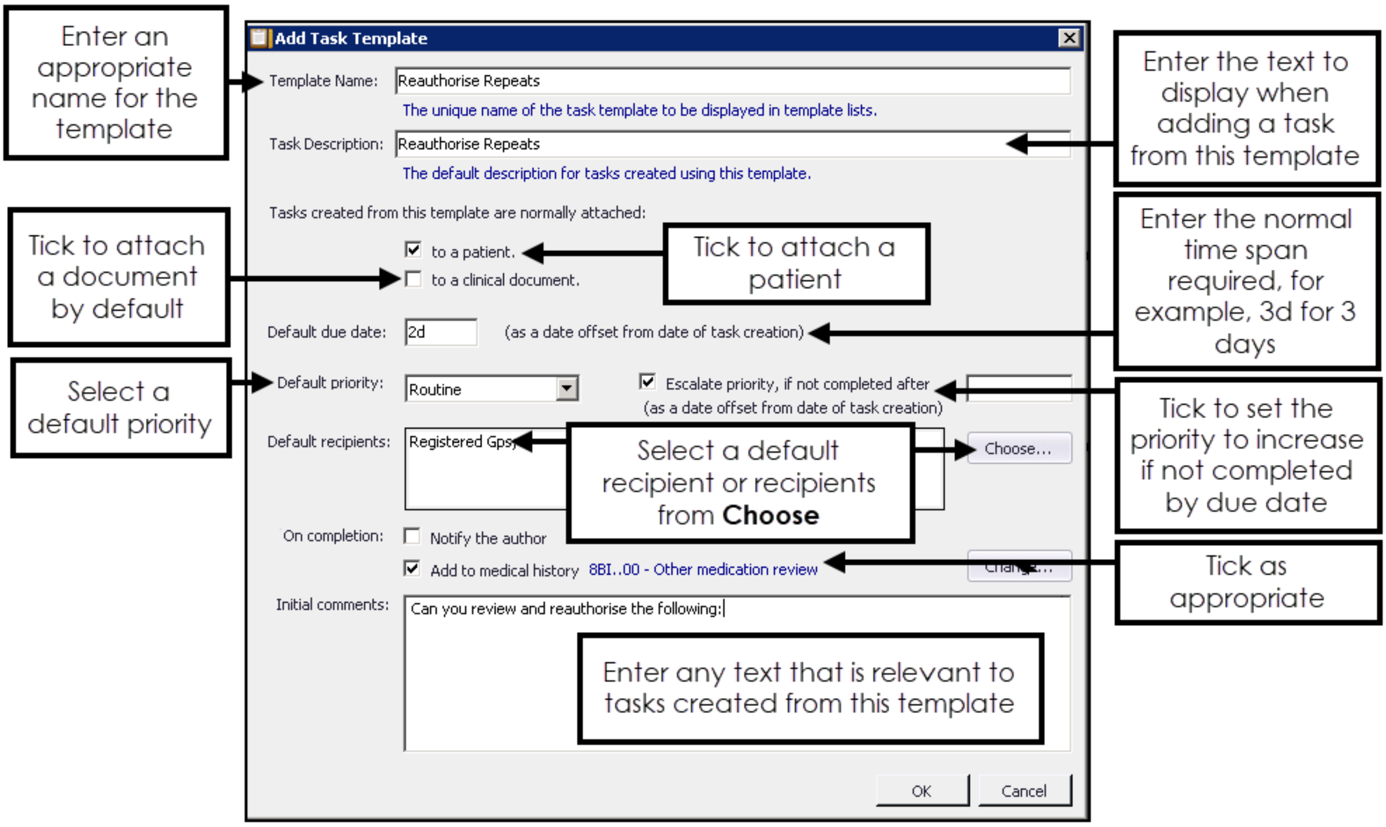
1. From **Daybook**, select **Task Template** [Task Templates].
2. Select **Create New** [Create New...] and the **Add Task Template** screen displays:



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.