Vision Daybook User Guide

Clinical and Administrative Task Management

Version 2

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Daybook

Introduction

The Vision Daybook module helps you to easily manage clinical and administrative tasks within your practice. From Daybook you can create, allocate, track and complete tasks from one screen for individual or groups of staff. All patient-related tasks are additionally displayed on the yellow Reminder box within Consultation Manager and Appointments. There are four types of tasks:

- **Patient (page 17)** - Tasks relating to a patient ie Reception to make an appointment for a patient.
- **Personal (page 26)** - Self assigned tasks ie. Reminder to confirm Vision user group meeting.
- **Announcement (page 24)** - Passive practice notifications ie Reception staff meeting at 12.30 in the boardroom.
- **Notifications (page 61)** - Tasks generated by Daybook itself for task completion confirmations.

Why should I use Daybook?

The advantages of using Daybook include:

- No more missed or mislaid paper messages.
- A full audit trail of all actions and communications relating to a task.
- Easily managed and prioritised tasks.
- Full integration with patient records including the ability to copy Medical History records directly from a patient record into a task.
- In England, GPES notifications are received and managed through Daybook.

What would I use Daybook for?

Examples of Daybook uses include:

- **Simple messages** - Practice and personal, eg "Please call Mrs Jones re her mother", "There is a parcel in reception for you".
- **Allocating, tracking and recording Home Visits** - eg send to all on call GP's - "Visit Mr Smith", they can accept, action and then complete the task, you are notified when it is done.
- **Repeat reauthorisations** - A quick template message to the responsible clinician to reauthorise medication already linked to the patient concerned.
- **Stock requests** - From the treatment room to whoever orders supplies.
- **Staff notices** - Meeting notifications, staff notices, social notices.

- Anything else that involves messages moving around your practice - Ask staff for their input, what messages do they send and receive?

Prerequisites

- **Practices with their own server** – You must ensure that you are up to date with **.NET Framework** installations. Hosted practices already have the latest .NET files installed, therefore no action is needed.
- **English Practices** – If you have Role Based Access Control (RBAC) enabled, you must ensure that you contact your Registration Authority (RA) to add Daybook access to all your staff. The RBAC activity linked to Vision Security Function for Daybook is:

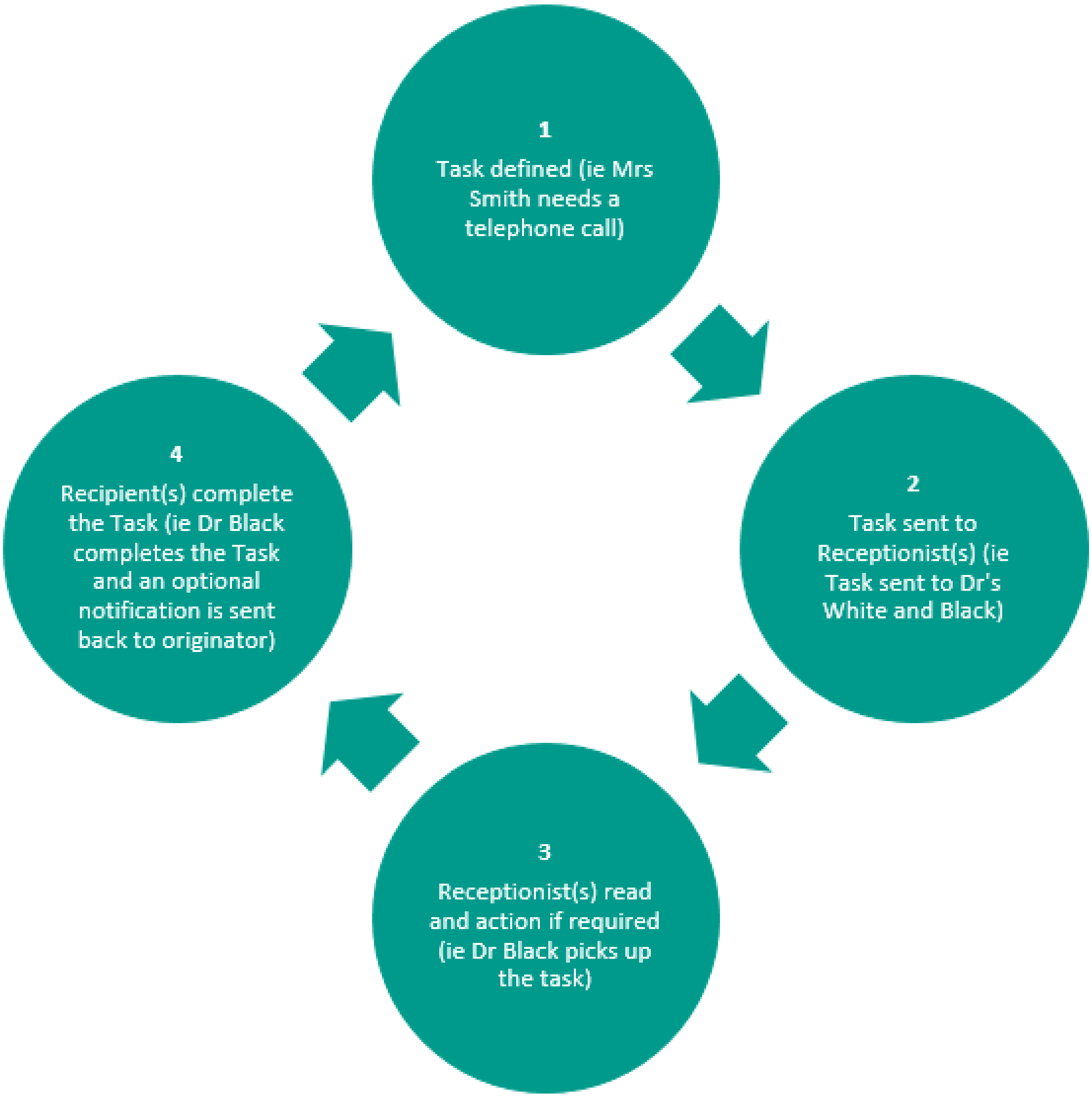
  – **B0093** Create Work Item

What You Need To Do

- **Security Rights -** Ensure all staff have security access to Daybook, from Management Tools - Control Panel - Security, see *Link to Help 'Add and remove users and groups from functions' http://www.inpshelp.co.uk/DLM480/Control_Panel/index.htm#30205*.
- **Staff Groups** – Create appropriate staff groups so that you can allocate Tasks more effectively. See Control Panel on-screen help.
- **Tidy Reminders** - Before using Daybook for the first time, it may be a good idea for you to tidy the yellow reminders that display in Consultation Manager and Appointments. Depending on how you have created these reminders you may need to do this via Clinical Audit or Patient Groups.
- **Set up RBAC (For RBAC enabled practices in England)** – See *Security - England* (page 67) for details.
- **Set up Task Templates** – The set up of Task Templates is highly recommended to speed up the creation of Tasks. See "*Adding a New Task Template* (page 74)".
- **Register for a practice Webinar –** Register for a practice webinar to get the most out of Daybook. For details see *http://www.inps4.co.uk/training/webinars/* (*http://www.inps4.co.uk/my-vision/training/webinars*)
- **Training -** See your Account Manager about the different training and consultancy options available to you. Or contact our Training Department.

Daybook Workflow Overview

The following diagram represents the workflow of a Daybook Task:



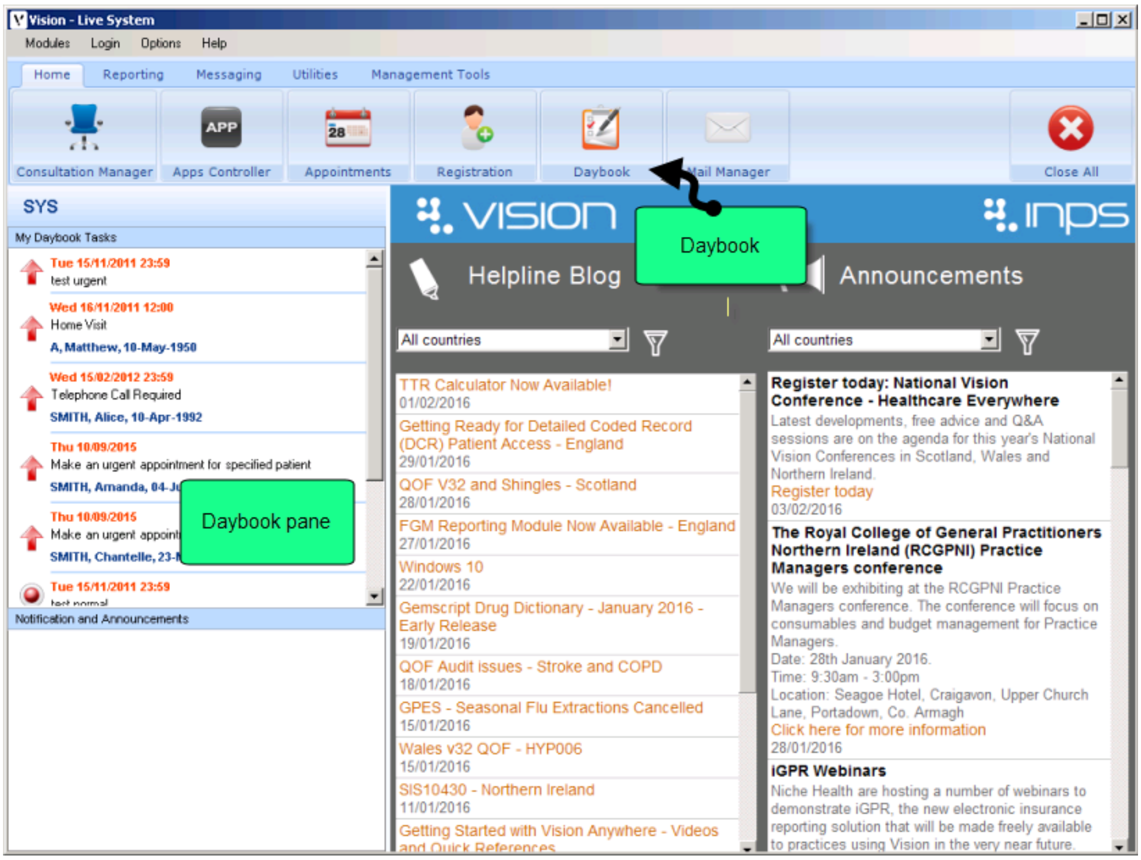
Accessing Daybook

Note - Before you access Daybook, please ensure the pre-requisites have been met; see "*Pre-requisites* (page 6)" for details.

To access Daybook:

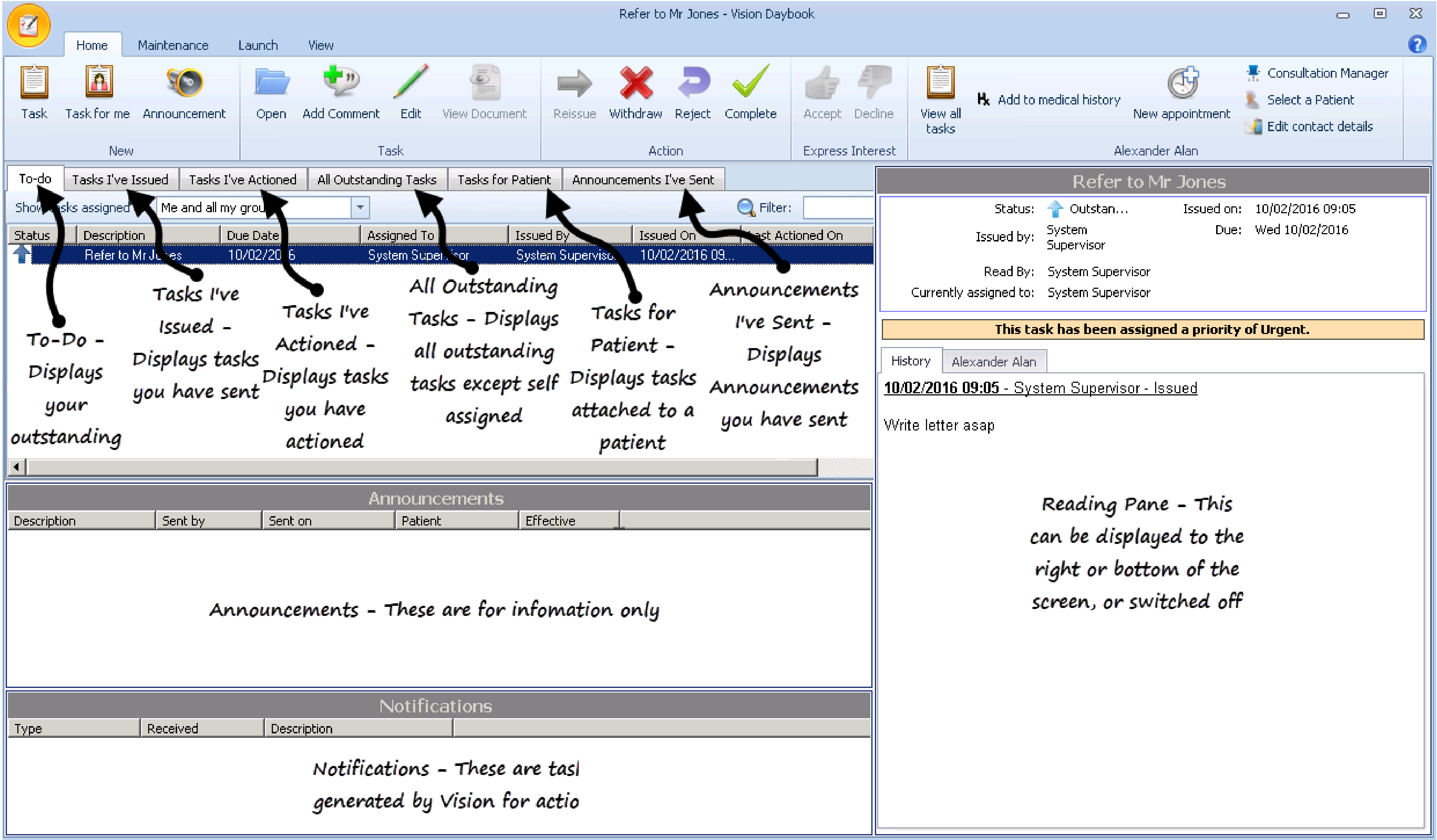
1. From your Vision front go to **Home – Daybook** 

or use the Daybook pane on the Vision front screen to access your allocated Daybook tasks and practice Notifications and announcements.



2. The Daybook loading screen is briefly displayed.

3. Daybook is displayed.


Refer to Mr Jones - Vision Daybook
Home
Maintenance
Launch
View
Task
Task for me
Announcement
New
Open
Add Comment
Edit
View Document
Task
Reissue
Withdraw
Reject
Complete
Action
Accept
Decline
Express Interest
View all tasks
Add to medical history
New appointment
Consultation Manager
Select a Patient
Edit contact details
Alexander Alan
To-do
Tasks I've Issued
Tasks I've Actioned
All Outstanding Tasks
Tasks for Patient
Announcements I've Sent
Filter:
Status
Description
Due Date
Assigned To
Issued By
Issued On
Last Actioned On
To-Do - Displays your outstanding
Tasks I've Issued - Displays tasks you have sent
Tasks I've Actioned - Displays tasks you have actioned
All Outstanding Tasks - Displays all outstanding tasks except self assigned
Tasks for Patient - Displays tasks attached to a patient
Announcements I've Sent - Displays Announcements you have sent
Announcements
Sent by
Sent on
Patient
Effective
Announcements - These are for infomation only
Notifications
Type
Received
Notifications - These are tasl generated by Vision for actio
Refer to Mr Jones
Status: Outstan...
Issued on: 10/02/2016 09:05
Issued by: System Supervisor
Due: Wed 10/02/2016
Read By: System Supervisor
Currently assigned to: System Supervisor
This task has been assigned a priority of Urgent.
History
10/02/2016 09:05 - System Supervisor - Issued
Write letter asap
Reading Pane - This can be displayed to the right or bottom of the screen, or switched off

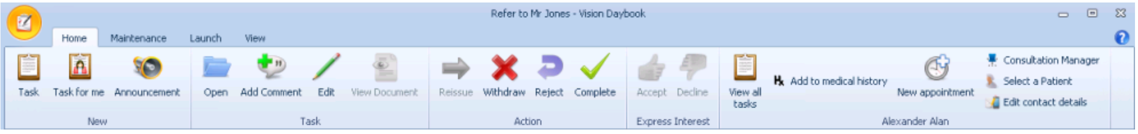
The Daybook Toolbar

The default toolbar for Daybook is ribbon style, it consists of four tabs:

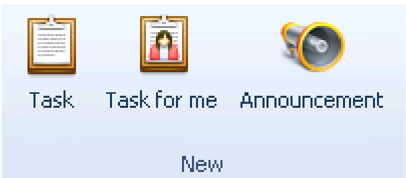
- **Home (page 11)** (Alt H) for day to day creating and actioning of tasks.
- **Maintenance** (page 13) (Alt M) for the set up and maintenance of tasks and Daybook
- **Launch (page 14)** (Alt L) for accessing other Vision modules from Daybook.
- **View (page 15)** (Alt V) for moving Daybook panes and switching to the Daybook traditional menu and toolbar should you not want to take advantage of the ribbon functionality.

Home Tab

The Home tab contains the options needed for day to day creating and actioning tasks:

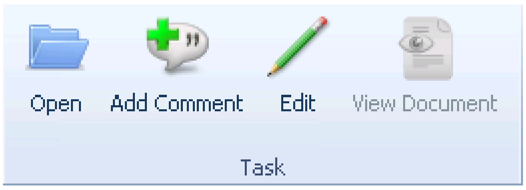


New



- **Task** (F2) - Creates a new task.
- **Task for me** (Ctrl +F2) - Creates a self-assigned task.
- **Announcement** (Ctrl +F3) - Creates an announcement.

Task



- **Open** (Ctrl +O) - Opens a highlighted task.
- **Add Comment** (Ctrl +W) - Adds a comment to a task.
- **Edit** (Ctrl +E) - Edits a task.
- **View Document** - To open Document Viewer for a document attached to a selected Task.

Action

- **Reissue** - Reissues a completed task.
- **Withdraw** - Withdraws a task you have created.
- **Reject** (F6) - Returns a task, uncompleted, back to its originator.
- **Complete** (F7) - Starts the completion process of a highlighted task.

Express Interest

- **Accept** (F4) - Indicates to others you intend to work on this task.
- **Decline** (F5) - Indicates to others you do not intend to work on this task.

Patient

- **View all tasks** - Lists all tasks for the patient associated with the task selected.
- **Add to medical history** (F9) - Adds a medical history entry to the selected patient's record.
- **New appointmen**t (F8) - Adds a new appointment to a selected patient.
- **Consultation Manager** -Opens Consultation Manager. If a patient has been selected.
- **Select a Patient** - To view all tasks for a specific patient.
- **Edit contact details** (page 12) - To add or update the selected patients contact details.
- **Patient** - The patient name is displayed here to act as a reminder for which patient record the above actions will update.

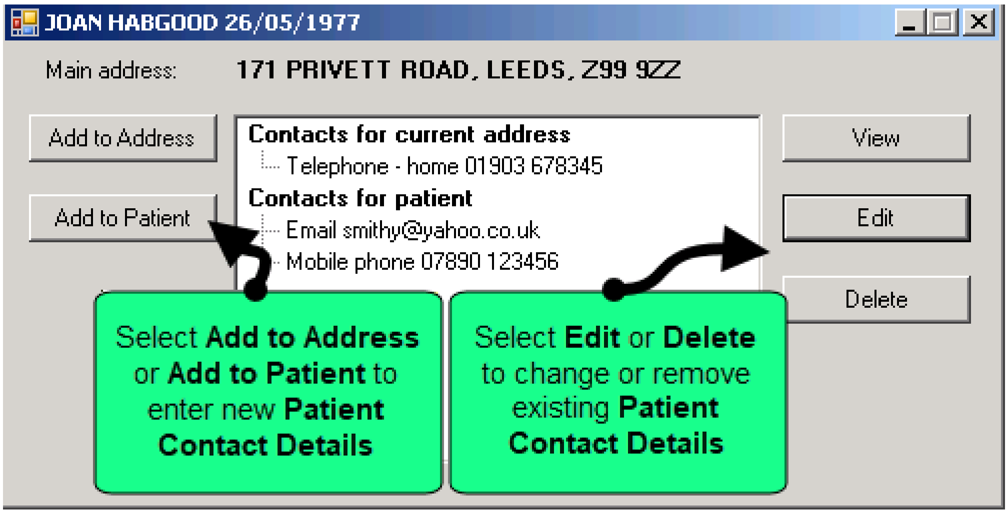
Edit Contact Details

If you have highlighted or opened a patient task, **Edit contact details** is enabled. To update the patients contact details:

1. With a task attached to a patient highlighted or from a selected task, select **Edit contact details**.

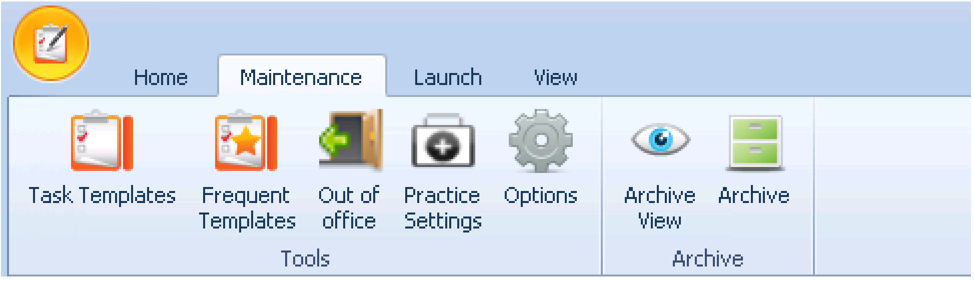
2. The Patient Contact Details screen is displayed showing:
   - The recorded **Contacts for Current Address** which applies to all members of the family registered to the address and,
   - The recorded **Contacts for the Patient** which applies to the individual patient only.

   You can add contact details from this screen by selecting either **Add to Address** or **Add to Patient.** You can also edit/delete existing information by selecting the contact detail and selecting either **Edit** or **Delete**.

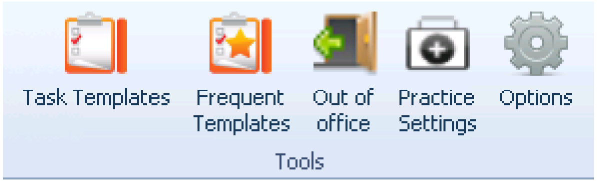


Maintenance Tab

The **Maintenance** tab contains all the options you require for the set up and maintenance of Daybook functions:



Tools



- **Task templates** -Accesses **Maintain Task Templates**.
- **Frequent Templates** - To view the task templates in **Frequent Templates**.
- **Out of office** - To set up an out of office message.
- **Practice Settings** - To set your practice opening times.
- **Options** - Accesses Daybook Options.

Archive

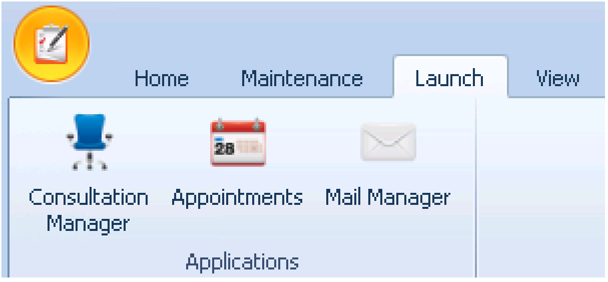
- **Archive View** - Accesses archived tasks.
- **Archive** - Runs an archive.

Launch Tab

The Launch tab enables you to launch any of the following Vision modules without leaving Daybook:

- **Consultation Manager**
- **Appointments**
- **Mail Manager**

Simply select the module you require.

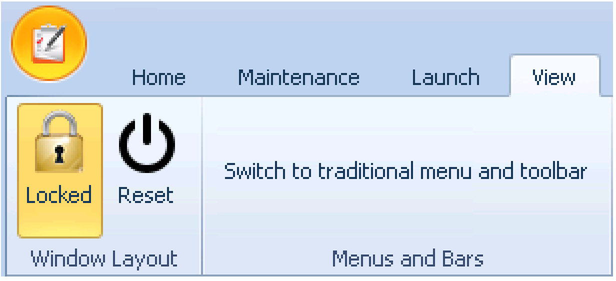


Note - Consultation Manager and Appointments open without a patient selected when launched from here.

View Tab

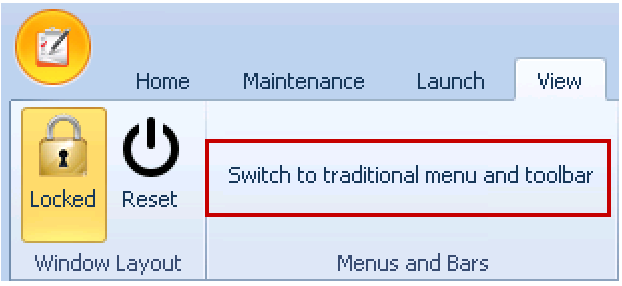
The View tab contains the options needed to:

- **Lock** - Lock the settings of your Daybook screen. See *Moving Panes Within Daybook* (page 63) for details.
- **Reset** - Reset your screens to the system default layout. See *Moving Panes Within Daybook* (page 63) for details.
- **Switch to traditional menu and toolbar** - Switch to traditional menu and toolbar view. See *Traditional Daybook Toolbar* (page 16) for details.

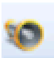


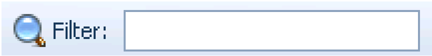
Traditional Daybook Toolbar

To switch to the traditional Daybook toolbar, from the **View** tab select **Switch to traditional menu and toolbar**.



The following buttons are available on the traditional Daybook toolbar:

-  **New Task** (F2) – Adds a new Task.
-  **New Task for me** (Ctrl + F2) - Adds a new self-assigned task.
-  **New Announcement** (Ctrl + F3) - Adds a new announcement.
-  **Open** (Ctrl +O) – Opens a task.
-  **Edit** (Ctrl +E) – Edits a task.
-  **Accept** (F4) – Claims a task sent to more than one person.
-  **Decline** (F5) – Refuses a task sent to more than one person.
-  **Complete** (F7) – Starts the complete a task process.
-  **Reject** (F6) – Refuses a task and return it to its originator.

-  **New Appointment** – Displays available appointments and allows you to book them.
-  **Record Medical History** – To record history to the patient record.
- 

 Filter – To search any data within Daybook, ie tasks for a colleague. This option is tab specific, use from the **All Outstanding Tasks** tab to search the whole outstanding Task list.

Adding Tasks

A task is a job or a piece of work that you can assign to an individual or group. It is usually quite short in duration or has a deadline, and a response is sometimes required. There are three general categories of task:

- **Specific Action**, usually tasks that require further action and can be assigned to a specific patient. (See *Adding a Task for Action* (page 18)).
- **Self-assigned**, usually a reminder to self. (See *Adding a New Self-assigned Task* (page 26)).
- **Announcement**, either practice wide or for specific individuals or groups, usually no further action required. (See *Adding a New Announcement* (page 24)).

Adding a Task for Action

To add a new task for either a member of staff or a staff group within Daybook:

1. From **Daybook**, select **Task** .
2. The **Issuing New Task** screen is displayed:

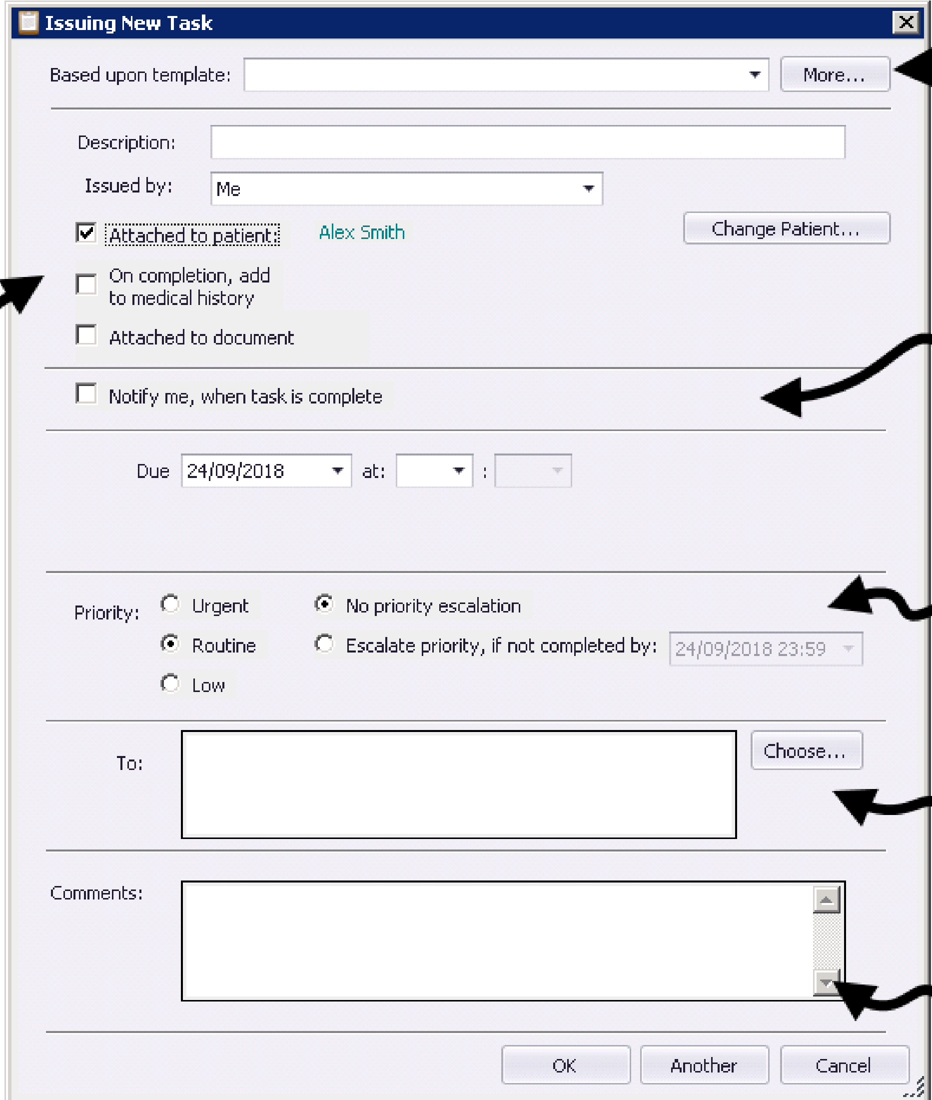
Description – Enter a description for the task

Issued by – Defaults to Me, change as required

Attached to Patient – Select to attach the task to a patient

On Completion add to medical history – Tick to add a medical history entry automatically when the task is completed

Attached to document – Select to attach a document from the selected patients record



Based upon template – Select a template if required

Notify me, when task is complete – Tick if you want to receive notification that the task has been completed

Priority – Select a priority and whether to escalate the priority or not

To – Select the recipients you require

Comments – Enter free text as required

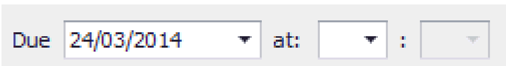
3. Complete as required:

- **Based upon template** – Allows you to select a predefined task from the Frequent Templates list. See *Task Templates* (page 72, *http://www.inpshelp.co.uk/DLM470/Daybook/index.htm#26847*) for further details.
- **More** – Allows you to select any predefined Task. See *Task Templates* (page 72, *http://www.inpshelp.co.uk/DLM470/Daybook/index.htm#26847*) for further details.

Note – If you are using a template, some of the following steps may be completed automatically but can be altered as required.

- **Description** – Enter a description for this task, eg Make appointment for patient.
- **Issued by** - Select who the new task is sent from, it defaults to Me, but you can select from any group you are a member of.

- **Attached to patient** – Tick to attach this task to a patient. To select the patient select **Change Patient** Change Patient... and select a patient in the usual way.
- **On completion, add to medical history** - Tick to add a medical history entry automatically when the task is completed. To select the Read code select **Change Read-code** Change Read-code... and select a Read code in the usual way.
- **Attached to document** - Tick to attach a document to this task. A list of documents on the selected patients record is displayed for selection.
- **Notify me, when task is complete** - Tick if you want to receive notification that the task has been completed.
- **Due** - If there is a time frame attached to this task, select a due date, and time.



- **Priority** – Select a priority:

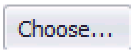
  – **Urgent** (precedes the task within your task list)

  – **Routine** (precedes the task within your task list)

  – **Low** (precedes the task within your task list)

  – **No priority escalation** - Selected by default, prevents the priority of the task from being escalated.

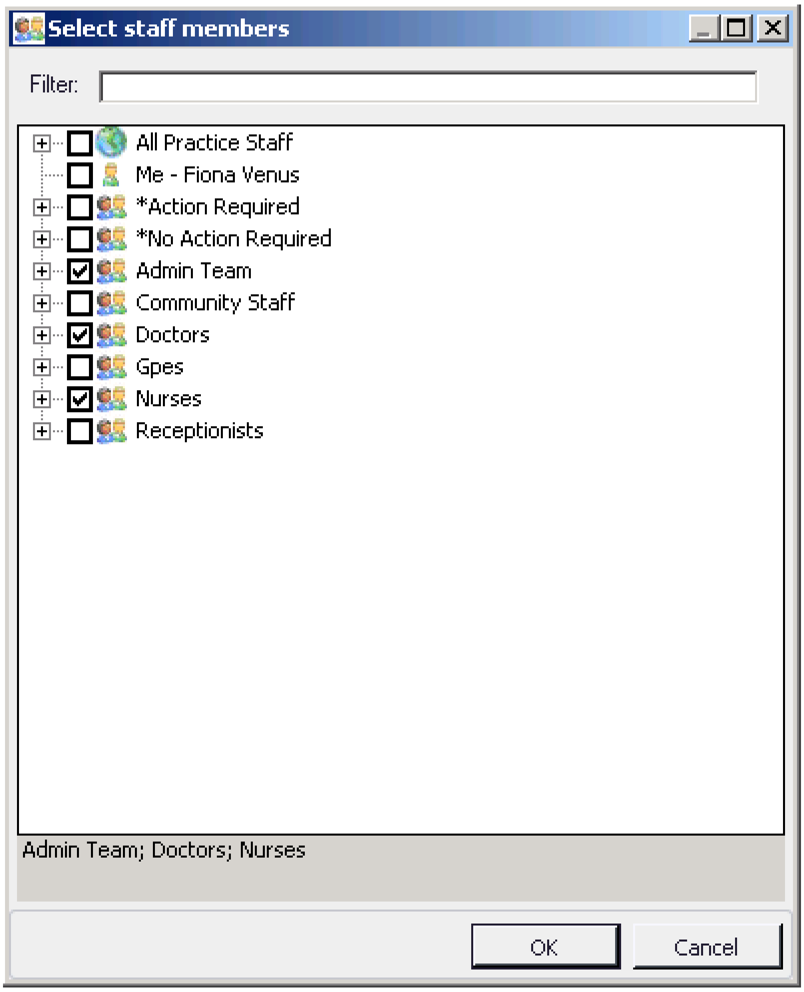
  – **Escalate priority, if not completed by** - Tick to automatically raise the priority of a task should it not be completed by the date specified in the original task.

- **To** - Select the recipients required by either:
  - Typing into the **To** box, a list of matching recipients and/or groups appears. To select from the list use the up and down arrows and press enter. You can also type **me** to select yourself or **all** to select everybody in the practice.
  - Select **Choose** 

 to view the hierarchical list of staff groups. Ticking any group or individual enters them into the **To** list, ticking again removes them.

Note – Staff Groups are set up within Control Panel and, if you are not already using Staff Groups for Mail Manager purposes, should be set up before Daybook is used. See Control Panel on-screen help for further details.

Important - All members of staff are currently available from the **Select staff members** list, whether they have security access to Daybook or not. Ensure that the member of staff you want to allocate a task to, has security access to Daybook.



Note – Even if a member of staff is in more than one group, they only receive one copy of the task.

- **Comments** – Type free text as required. If this task is linked to a patient, you can press the **Insert** key to list their medical records, select a record to insert in the text and select **OK** to save and return to the task. The Insert process can be repeated to add more than one medical record. See *Adding Clinical Information to a Task* (page 22) for further details.

Note - The \ | { } characters do not display within Comments.

- **Another** – Saves the current Task and presents a new **Issuing New Task** screen.

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

The Task is now displayed in the **To-Do** list of the selected recipient(s).

Adding Clinical Information to a Task

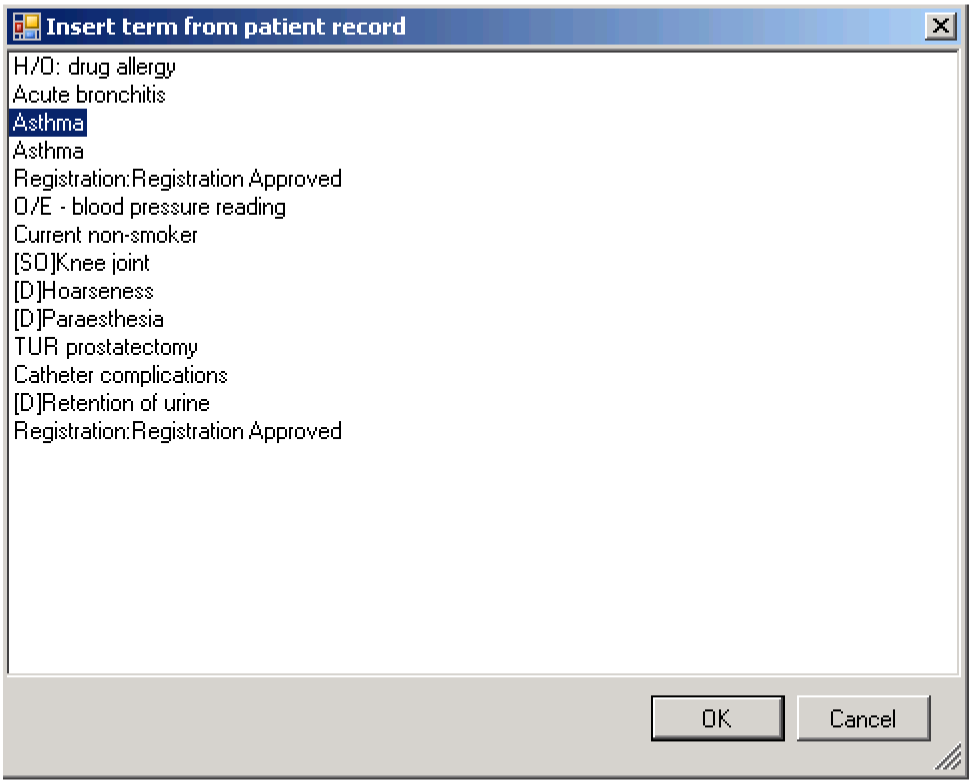
When adding comments to a task attached to a patient, you can display a summarised list, created from the patient's record, by pressing the **<Insert>** key. You can also add any of the displayed records to the Comments section of the task you are creating.

To use the Insert key:

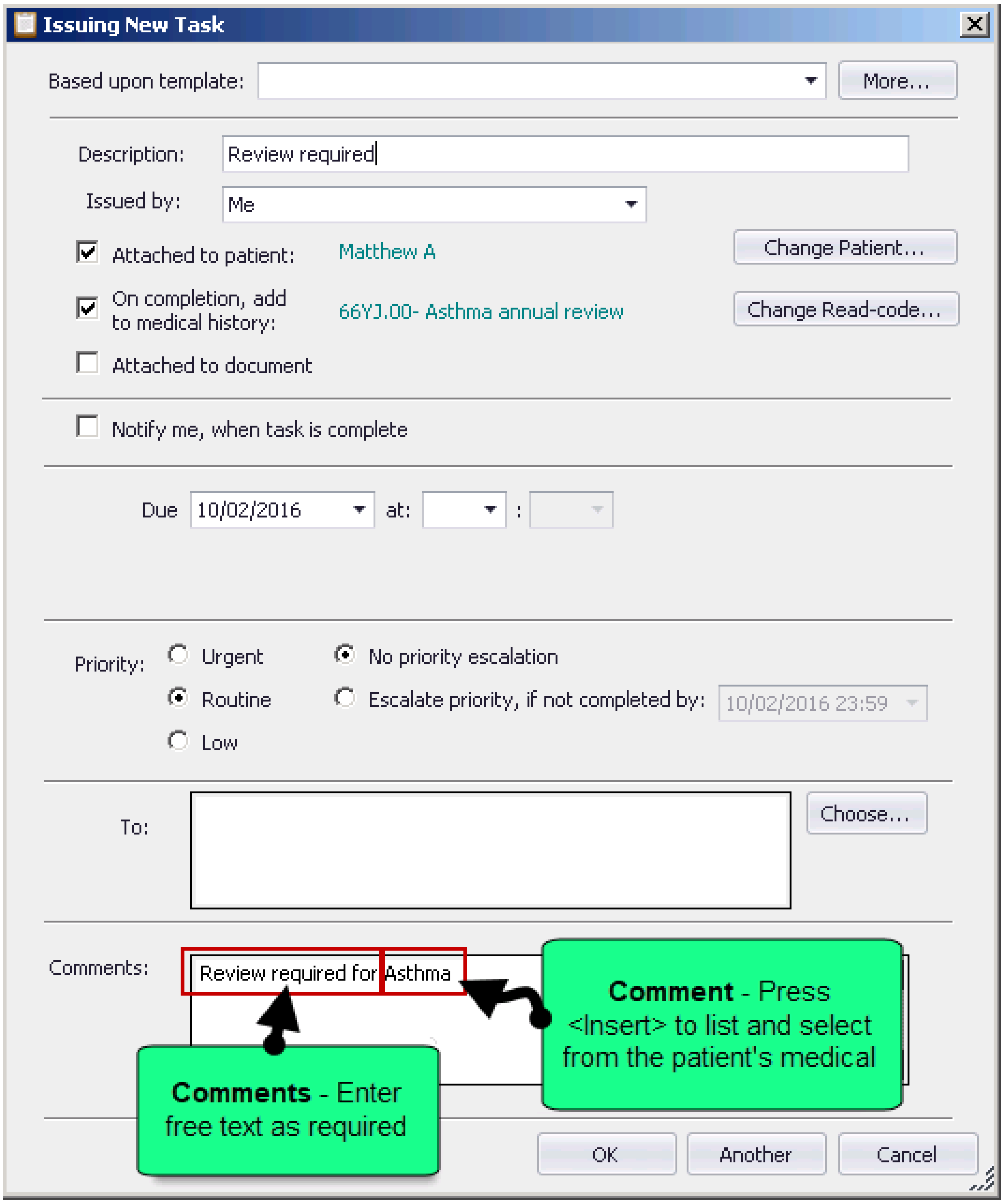
1. From Daybook, select **Task** and complete as detailed in *Adding a Task for Action* (page 18).
2. Click into **Comments** and press **<Insert>.**
3. Insert term from patient record is displayed, listing entries from the patient's:
   - Medical History
   - Lifestyle
   - Examination Findings

   Note - Numeric values included in clinical data are not pasted into the task.

   - Disease Registers



4. To add any of the listed items to the Comments section of the task, highlight the item required and then select **OK**.



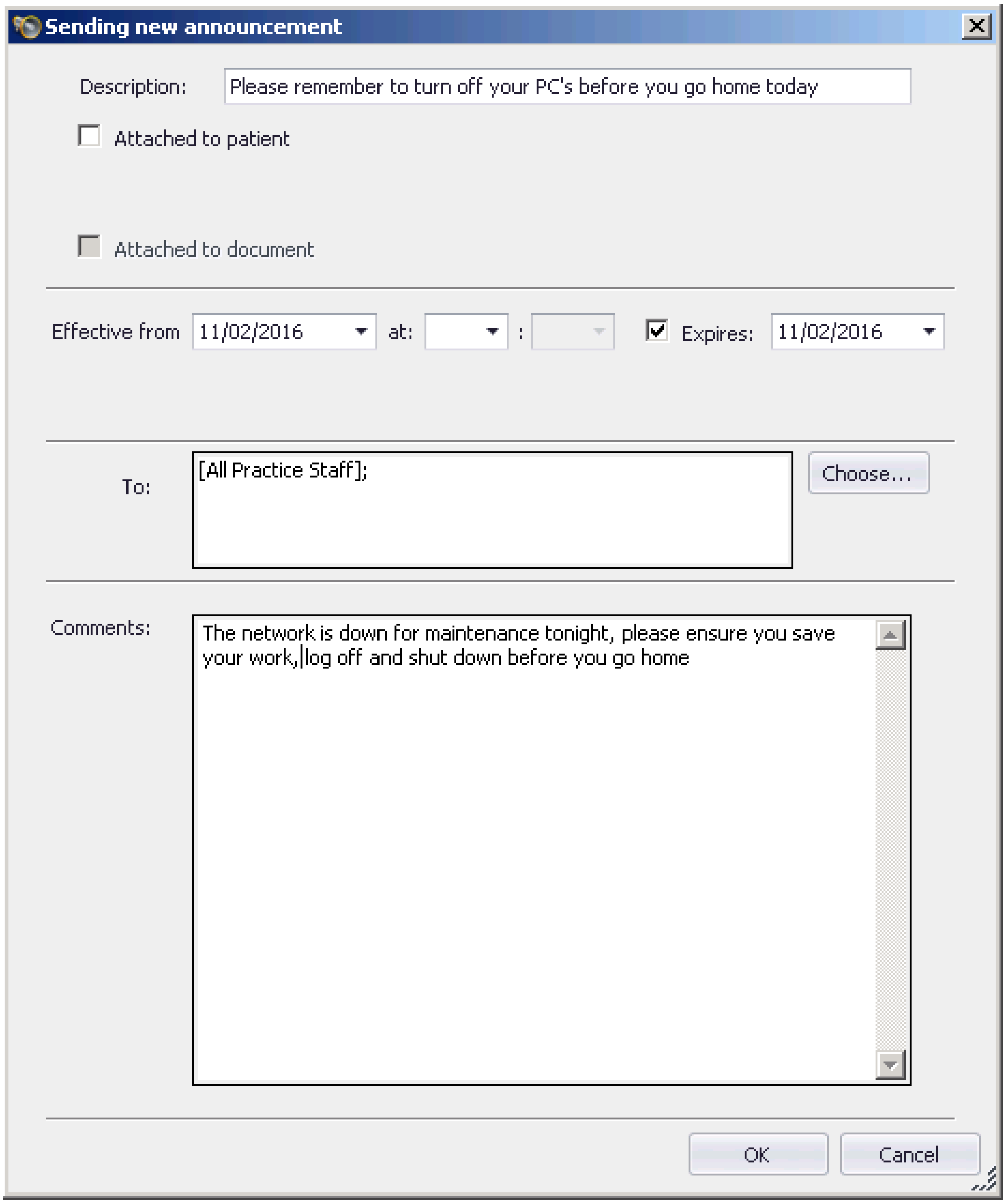
5. You can append the text of the inserted entry as required.
6. To add further entries repeat steps 5 and 6 as required.
7. Select **OK** to save and close.

Please be aware the **<Insert>** key function acts as a copy and paste facility from the **Insert term from patient record** list, it is not a link from the patient record through to Daybook.

Adding a New Announcement

An Announcement is a general message to other members of staff for information purposes only. An Announcement does not need actioning eg Fire Alarm Test at 14.00. To add a new Announcement, for either a member of staff or a staff group within Daybook:

1. From **Daybook**, select **Announcement** .
2. The **Sending new announcement** screen is displayed.



3. Complete as required:

- **Description** – Select to enter a description of the announcement.
- **Attached to Patient** – Tick this if you want to attach this announcement to a specific patient.
- **Effective Date** – Select to set the date on which the event being announced takes place
- **At** – Select to set a time for this announcement.
- **Expires** – Defaults to today, tick if required and change the date as appropriate.
- **To** – Select to select the recipients of this announcement by either:

  – Typing into the **To** box. A list of matching recipients appears. To select from the list use the up and down arrows and press **Enter**.

  – Select **Choose** Choose... to view the hierarchical list of staff groups. Ticking any group or individual enters them into the **To** list, ticking again removes them and press **Enter**.

Remember – Add yourself if you want to see this Announcement.

- **Comments** - Type any message for the announcement as required. If a specific patient has been selected you can use the **Insert** key to obtain a list of Read terms recorded in the patient's record. Select the term required and then select **OK**.

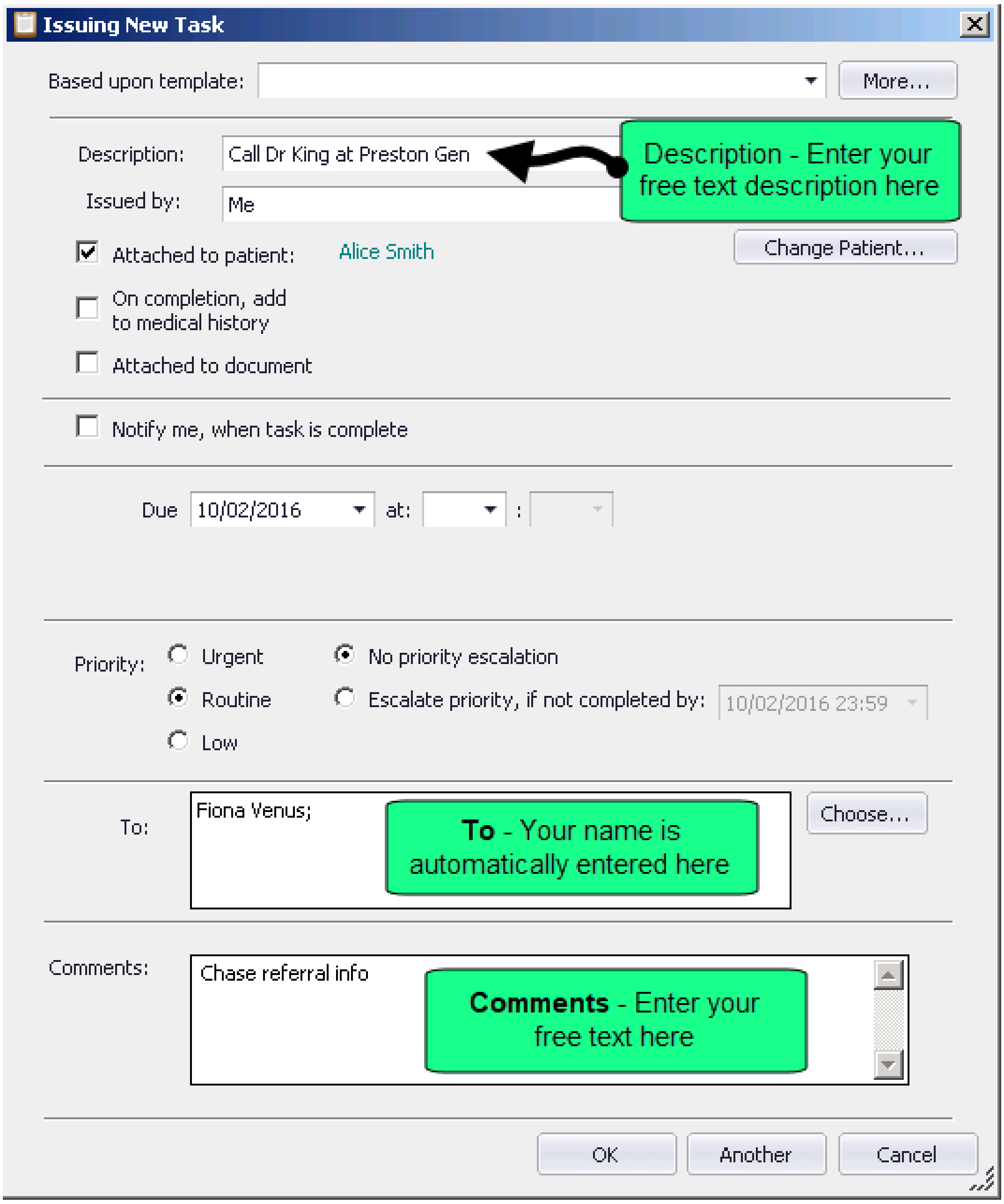
4. Select **OK** to finish and send.

Adding a New Self-assigned Task

A Self-assigned Task is a way of sending a message to yourself, eg a reminder to do something. Self-assigned tasks are not visible to other Daybook users.

To add a self-assigned task:

1. From **Daybook**, select **Task for Me** .
2. The **Issuing New Task** screen is displayed.



3. Complete as required:

    - **Based upon template** - Select a template if appropriate.
    - **Description** – Select to enter a description for the task.
    - **Issued by** - Defaults to **Me**, use the down arrow to select from staff groups you are a member of if appropriate.
    - **Attached to Patient** – Select to attach the task to a patient.`
    - **On completion, add to medical history** - Tick if appropriate and select the Read code required.
    - **Notify me, when task is complete** - Tick if appropriate.
    - **Due** –Select to add a date and a time for this task to be completed by.
    - **Priority** - Select if appropriate.
    - **No priority escalation** or **Escalate priority if not completed b**y - Select to automatically raise the priority of a task should it not be completed by the date specified.
    - **To** - Your details are already completed in this section, you can add further recipients if required.
    - **Comments –** Type any details relating to the task if required. If a specific patient has been selected you can use the **Insert** key to obtain a list of Read terms recorded in the patient's record. Select the term required and select **OK**.

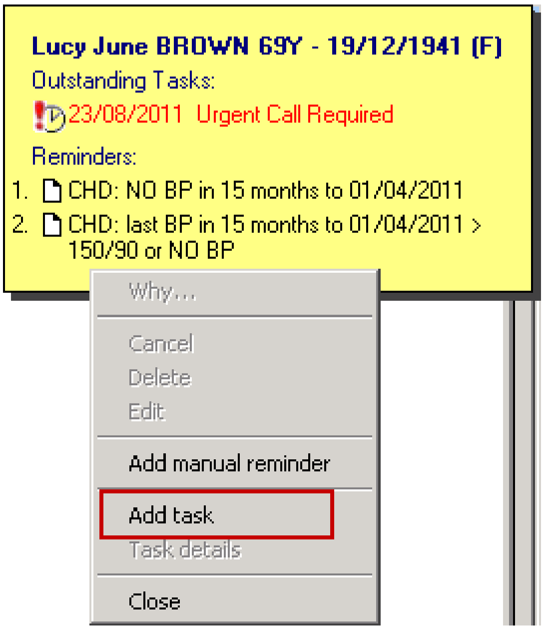
4. Select **OK** to finish.

The Task is now displayed in your **To-Do** list.

Adding Tasks from Consultation Manager

You can add a new task directly to a patient from within their record in Consultation Manager:

1. From within a patient record, a consultation does not need to be opened, either select **Tasks – Add New Task** or if there are existing reminders for the patient, right click on the Reminder and select **Add task**.

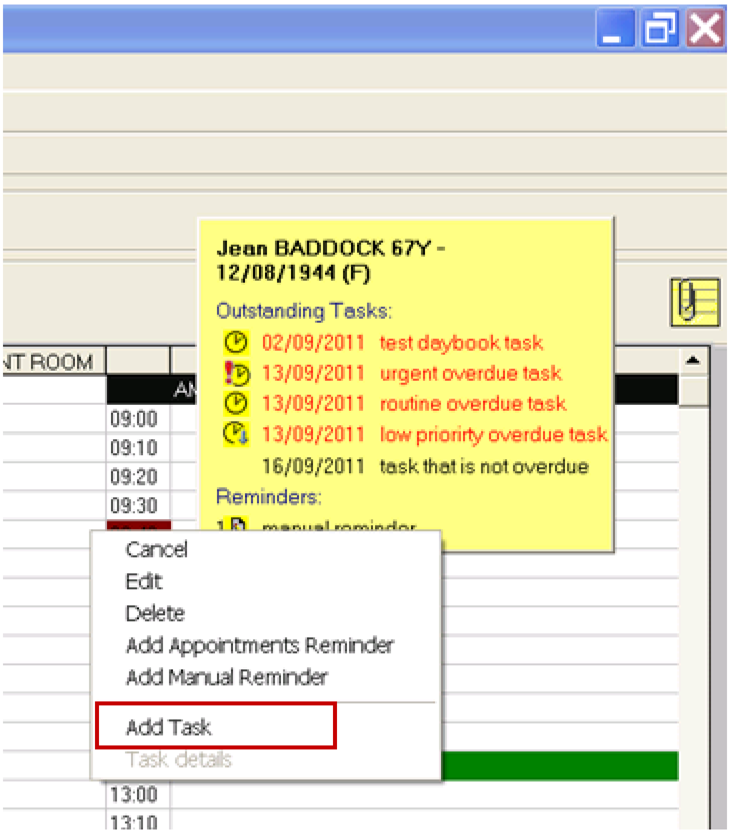


2. **Issuing New Task** is displayed with the details of the selected patient completed. Complete the task details as described in "*Adding a Specific Action Task* (page 18)".

Adding Tasks from Appointments

You can add a new task directly to a patient from within Appointments:

1. From within Appointments, right click on the Reminder and select **Add task**.



2. **Issuing New Task** is displayed with the details of the selected patient completed. Complete the task details as described in "*Adding a Specific Action Task* (page 18)".

Managing Tasks

Tasks can be managed either from the Daybook pane on the Vision Front screen, or from one of the six tabs within the Daybook module itself:

Front screen

- **My Daybook Tasks (page 31) -** Lists all your uncompleted tasks.

Daybook

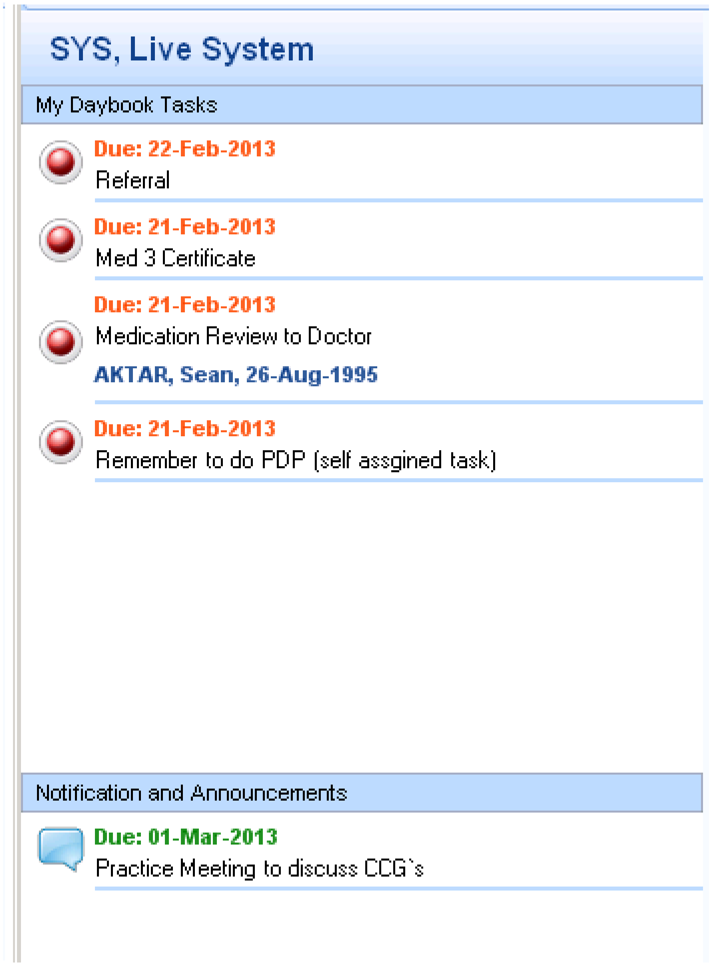
- **To Do (page 33)** – Lists all the outstanding tasks awaiting your attention.
- **Tasks I've Issued** (page 41) – Lists all the tasks you have sent awaiting action.
- **Tasks I've Actioned** (page 43) – Lists tasks you have completed.
- **All Outstanding Tasks** (page 46) – Lists all the outstanding tasks within the practice.
- **Tasks for Patient** (page 46) – Lists tasks linked to a specific patient.
- **Announcements I've Sent** (page 47) - Lists announcements you have issued.

Daybook Pane on the Vision Front Screen

The **My Daybook Tasks** pane is displayed on the Vision front screen. It displays a list of uncompleted tasks:

- assigned to you
- assigned to group(s) you belong to
- assigned to all practice staff

Exactly as in your **Me and all my groups** view within your Daybook To-Do list, Tasks are ordered by descending due date.



Notifications and Announcements displays any active **Notifications and Announcements** from Daybook.

Tasks and 'Notifications and Announcements' are symbolised by priority and status in the following ways:

- Task announcement
- Task completed
- High priority task
- Low priority task
- Task is a normal priority
- Overdue high priority task
- Overdue low priority task
- Overdue normal priority task
- Task returned

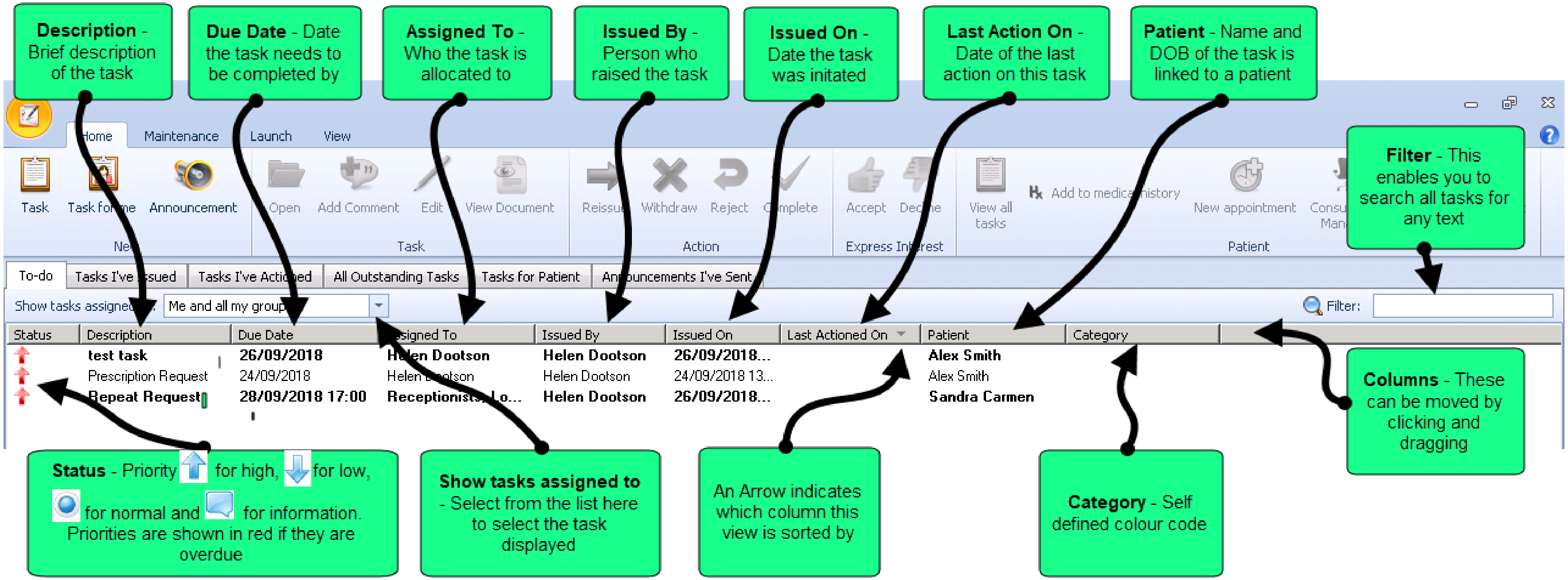
To open a task in Daybook, double-click on it, this launches Daybook with that particular task selected.

Please note the following

- For practices in England using EPS2, please remember that you must have the activity B0093 allocated to your Smartcard in order to access Daybook. See *Security - England* (page 67) for details.
- The task refresh rate for the Daybook panel is as specified in the '**Check for new tasks Refresh tasks and announcements every**' box in **Daybook Options - Startup and Alerts** (page 68).

To-Do

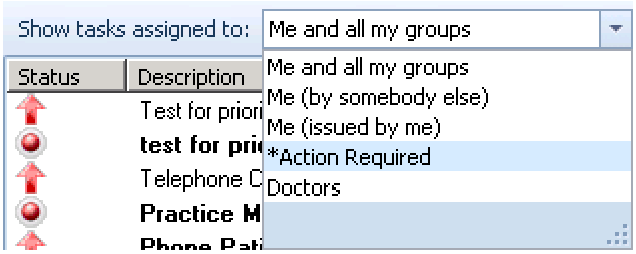
To view tasks allocated to you individually or as a member of a staff group, from the Daybook main screen, click on the **To-Do** tab.



Description - Brief description of the task
Due Date - Date the task needs to be completed by
Assigned To - Who the task is allocated to
Issued By - Person who raised the task
Issued On - Date the task was initated
Last Action On - Date of the last action on this task
Patient - Name and DOB of the task is linked to a patient
Filter - This enables you to search all tasks for any text
Columns - These can be moved by clicking and dragging
Status - Priority for high, for low, for normal and for information. Priorities are shown in red if they are overdue
Show tasks assigned to - Select from the list here to select the task displayed
An Arrow indicates which column this view is sorted by
Category - Self defined colour code

The To-Do tab can be filtered to show tasks assigned to:

- **Me and all my groups** - You plus any groups you belong to.
- **Me (by somebody else)** - You by somebody else.
- **Me (issued by me) –** Self-assigned.
- **Groups by name** - Separate groups you belong to.



Example of the To-Do tab filter

The **To-Do** tab has the following columns:

StatusThis enables	When ordered by priority, items are grouped according to whether they are Urgent , Routine , Low , Replies or notifications of Returned Tasks.
Description	The short description of the task. This can be sorted alphabetically.
Due Date	Groups items according to Due Date in the following categories: • Overdue • Today • Next 7 days • Future An option can be set to automatically navigate to today when the list is opened.
Assigned To	The full list of recipients of the task.
Issued By	The person who raised the task.
Issued On	The date and time that the task was raised. For tasks issued before DLM 470, the Issued On date displays as unavailable.
Patient	The name and date of birth of the patient attached to the task, blank if there is no patient. Can be sorted alphabetically.
Category	Groups the items according to your user-defined categories.

The To-Do tab can be ordered by any of the columns by clicking on the column header required. Unread items within the list are shown in bold.

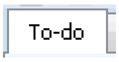
When you select on an item, a reading pane is displayed containing:

- Full text as entered when the task was defined.
- Any comments or actions added by recipients of the task. This acts as the audit trail for the task.

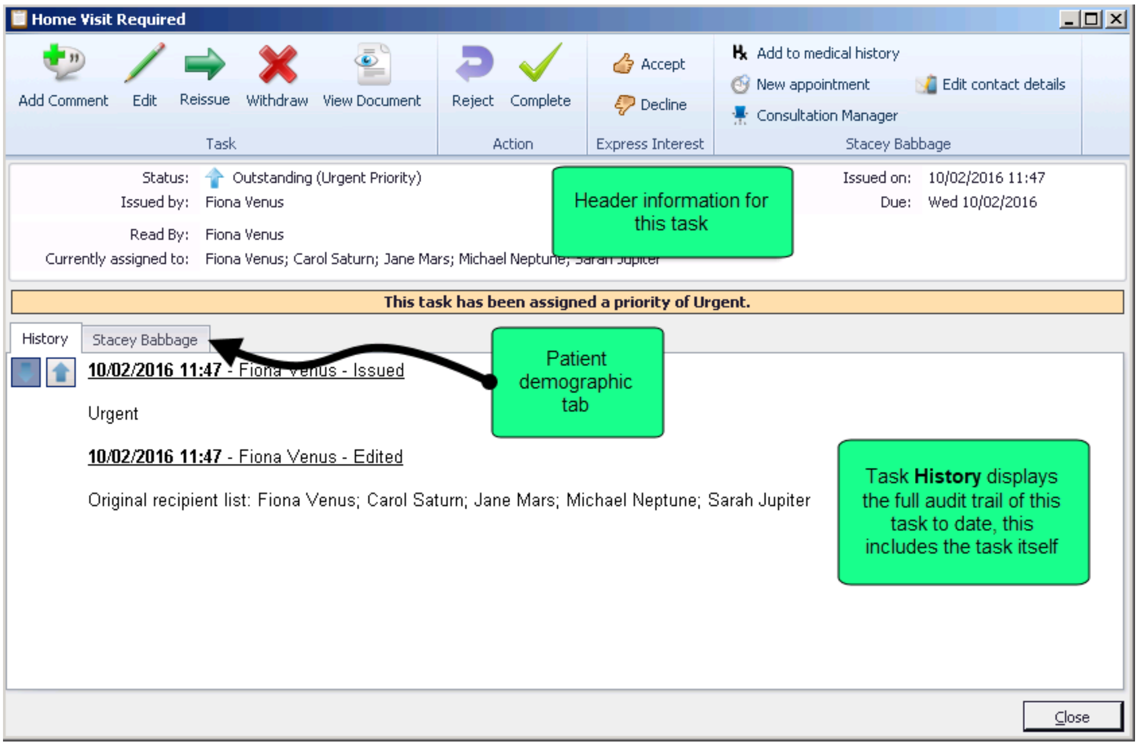
If a task is viewed via the reading pane for longer than the time span defined in the set up, it is automatically marked as Read. The default time on this facility is 5 seconds, see *Lists* (page 69) for details on how to change this setting.

Actioning and Completing Tasks

To action a task that has been allocated to you from your **To-do** tab:

1. From the Daybook main screen, select the To-do tab .

2. Double click on the task required and the task is displayed:



3. Action the item as required using:
   - 

Add Comment - Select to add comments to the task.
   - 

Edit – Opens the original task allowing any changes to be made. The change is recorded in **History** with staff name, date and time of edit.
   - 

Reissue - Select to reissue a task.
   - 

Withdraw- Select to withdraw the task, only available if you are the originator of the task.
   - 

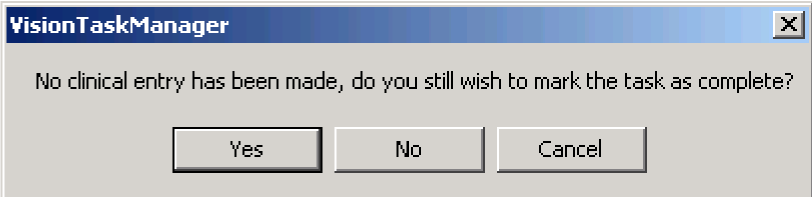
View Document - Select to view an attached document, only available if a document is attached to the task.

- 

Reject - Select to return the task to sender unactioned.
- 

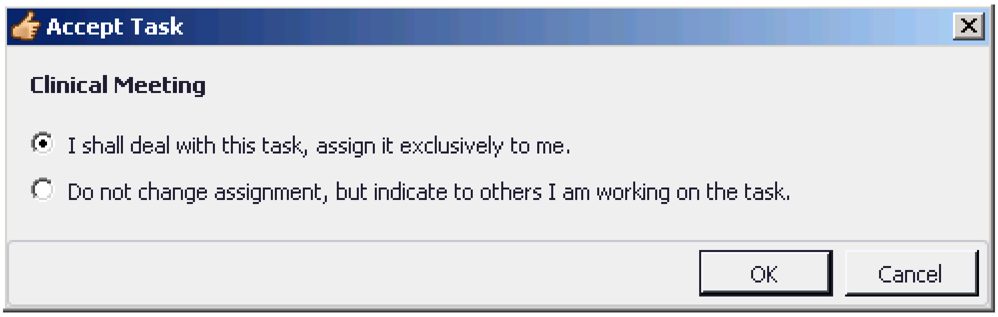
Complete – Select once the actual request (the doing of the task) has been completely finished.

  – If a Read code has been assigned to the task template an SDA appears. Enter the data requested and select **OK**, or select **Cancel** to continue without recording data. If **Cancel** is selected the **No clinical entry has been made** message is displayed, select **Yes** if you want to mark it as complete without adding a clinical entry, or **No** to leave it as outstanding.

  – If no Read code has been assigned, **Completing task** is displayed. Add comments if required and tick **Send notification to the Author's to-do list** if appropriate. Select **OK** to save and close.
- 

Accept – Select to accept a task that has been sent to more than one member of staff. The **Accept Task** screen is displayed, select either *I shall deal with this task, assign it exclusively to me* which removes it from everyone else's To-Do tab, or *Do not change assignment, but indicate to others I am working on the task* which leaves it available to be picked up by other staff members. Select **OK** to save and close.



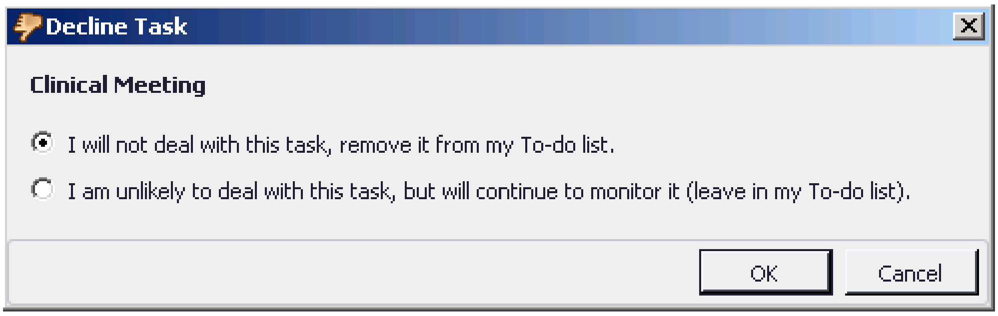
- 

Decline – Select this option to decline the task, the **Decline Task** screen is displayed, select either

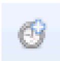
  – *I will not deal with this task, remove it from my To-Do list* which removes the item from your To-Do list.

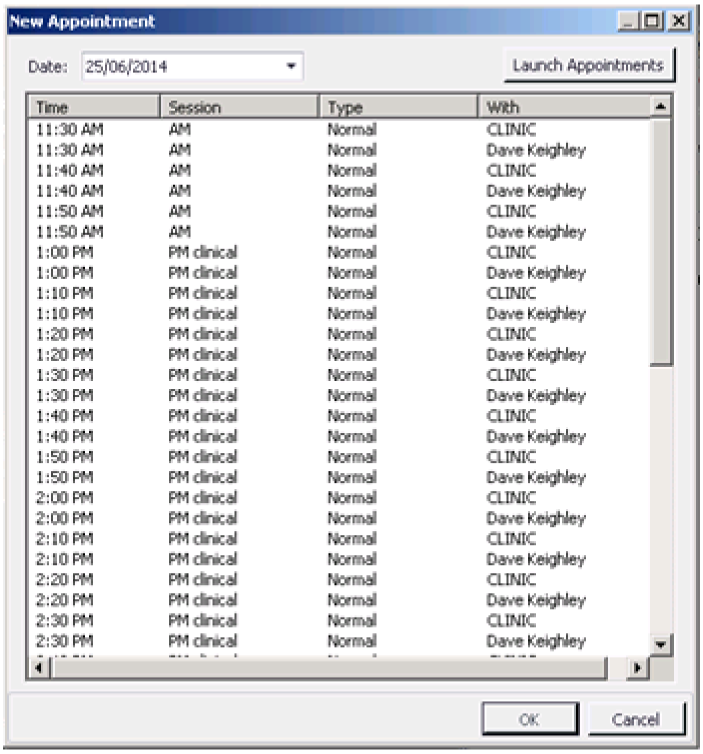
  – *I am unlikely to deal with this task but will continue to monitor it (leave it in my To-do list)* which leaves the item on your To-Do list.

  Select **OK** to save and close.



-  **Add to medical history** – This displays a **Read Dictionary** screen where you can add medical history in the usual way enabling you to record data in the selected patient's record.

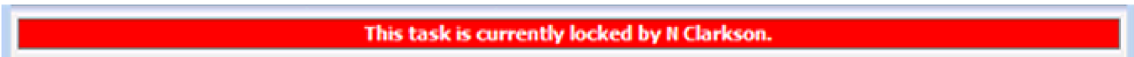
-  **New Appointment** – Launches a free slot search. Select the date required from the **Date** list and then highlight the appointment you want to book. Select **OK**. A **Confirm Appointment** screen is displayed; **Additional Notes** can be added here if required. Select **Confirm**. On booking an appointment, you are offered an option to **Complete** the task. Complete the task if appropriate.



-  **Consultation Manager** - Launches **Consultation Manager** and selects the patient assigned to the task. The task remains open.
-  **Edit contact details** - If the task is attached to a patient, you can update the contact details for a patient from here.

4. Select  to close.

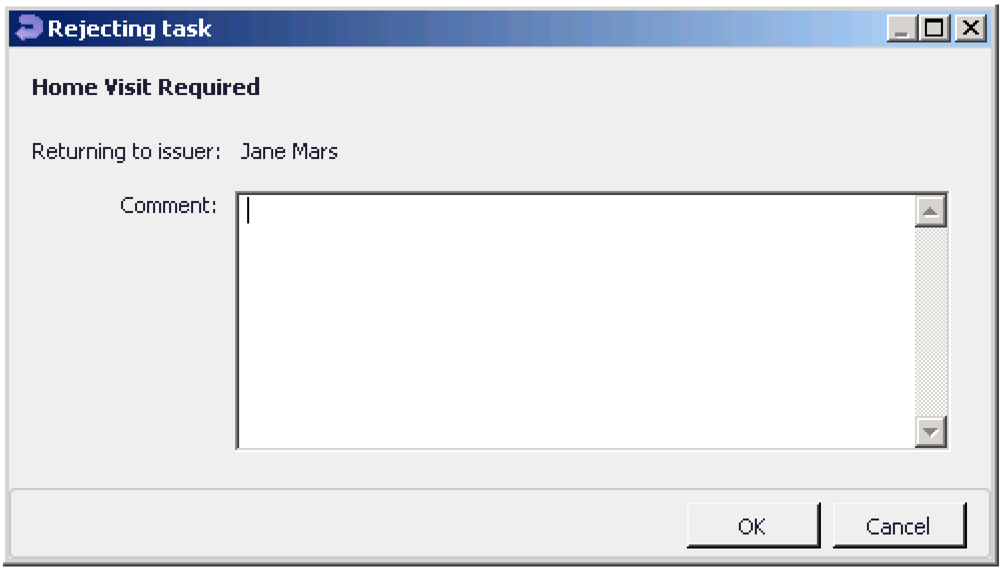
If another member of staff is accessing a task when you double click on it, the Task displays with a red **The task is currently locked by another user** bar on it.



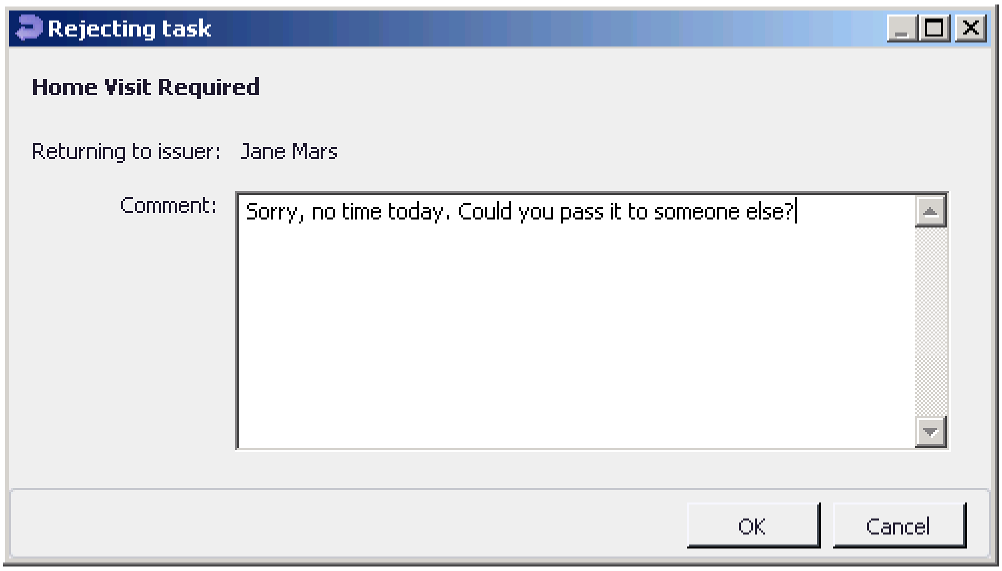
Rejecting Tasks

To return a task to its originator, without actioning it:

1. Highlight the task and select **Reject** 
.
2. The Rejecting Task screen is displayed.



3. Enter a reason into **Comments**.

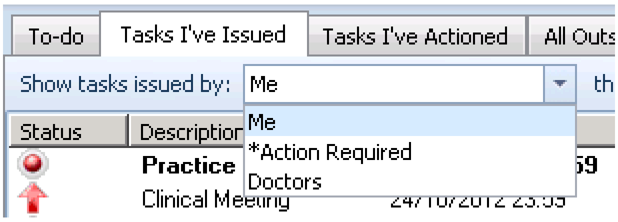


4. Select **OK** to save and close.

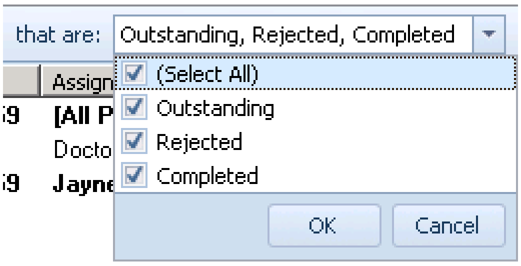
The task is now returned to its originator.

Tasks I've Issued

The **Tasks I've Issued** tab displays all the tasks created and distributed by you or groups that you are a member of, that are either still 'outstanding' or 'completed, notify when task complete'. The tasks can be filtered using the **Show tasks issued by**:



You can filter the tasks displayed by ticking the type of tasks required on the **that are** list.



- **Select All** - Displays all the following tasks.
- **Outstanding** - To view all tasks that require action.
- **Rejected** - To view all tasks that have been returned to sender.
- **Completed** - To view all tasks that have been completed.

Outstanding tasks can be:

- **Commented on -** Click **Add Comment**  to add a comment to the task.
- **Edited** - Click **Edit**  to make any changes you require and then click **OK** save. The edited task automatically updates as unread for all its recipients.
- **Resent** - Select **Reissue**  and then click **OK**.
- **Withdrawn** – Click **Withdraw**  and then **Yes** to the "*Are you sure you wish to delete selected task?*" message.

Rejected tasks can be:

- **Resent** – Right click on the task and select **Resend**.
- **Withdrawn–** Right click on the task and select **Withdraw**.

Note - Returned items are indicated by in the **Status** column.

Completed tasks can be:

- **Reissued –** Click on the task and select 

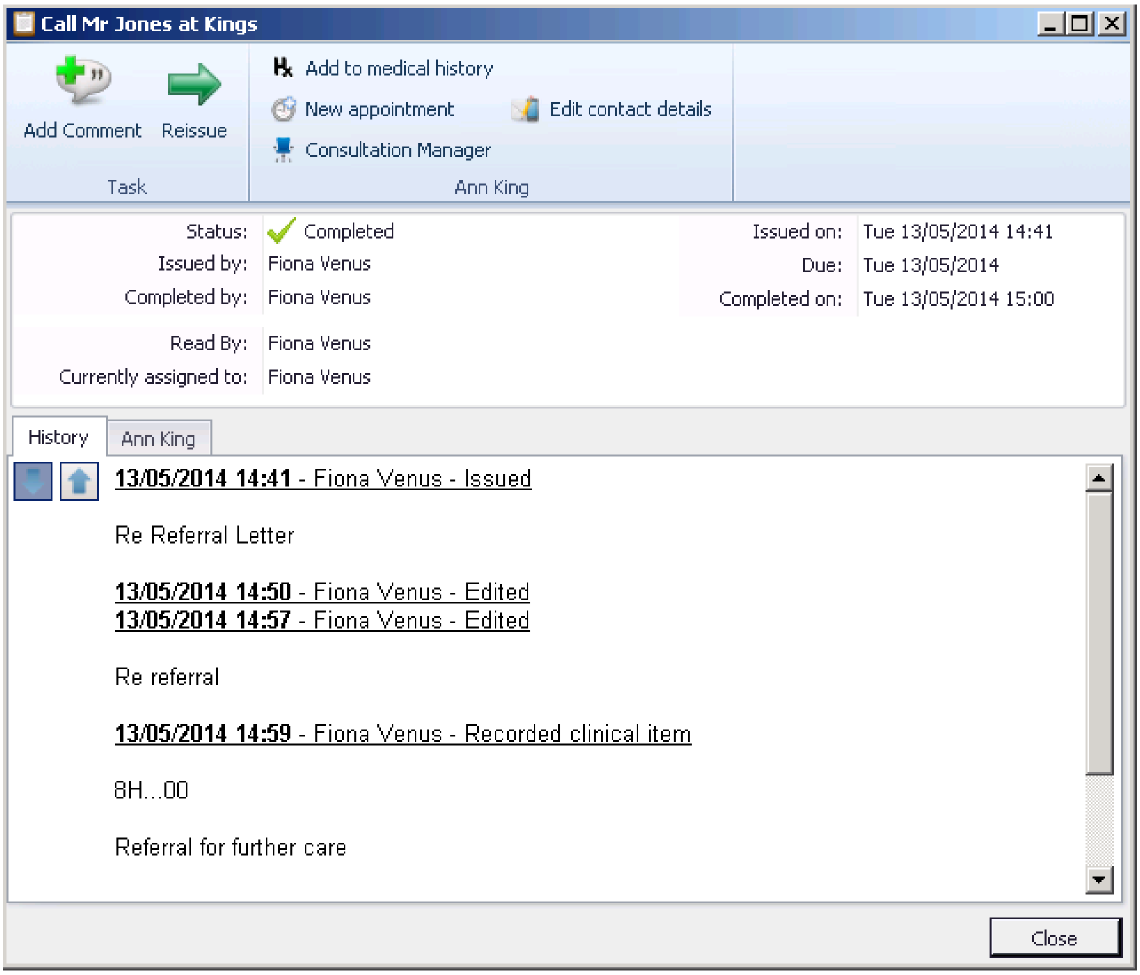
Reissue.

Tasks I've Actioned

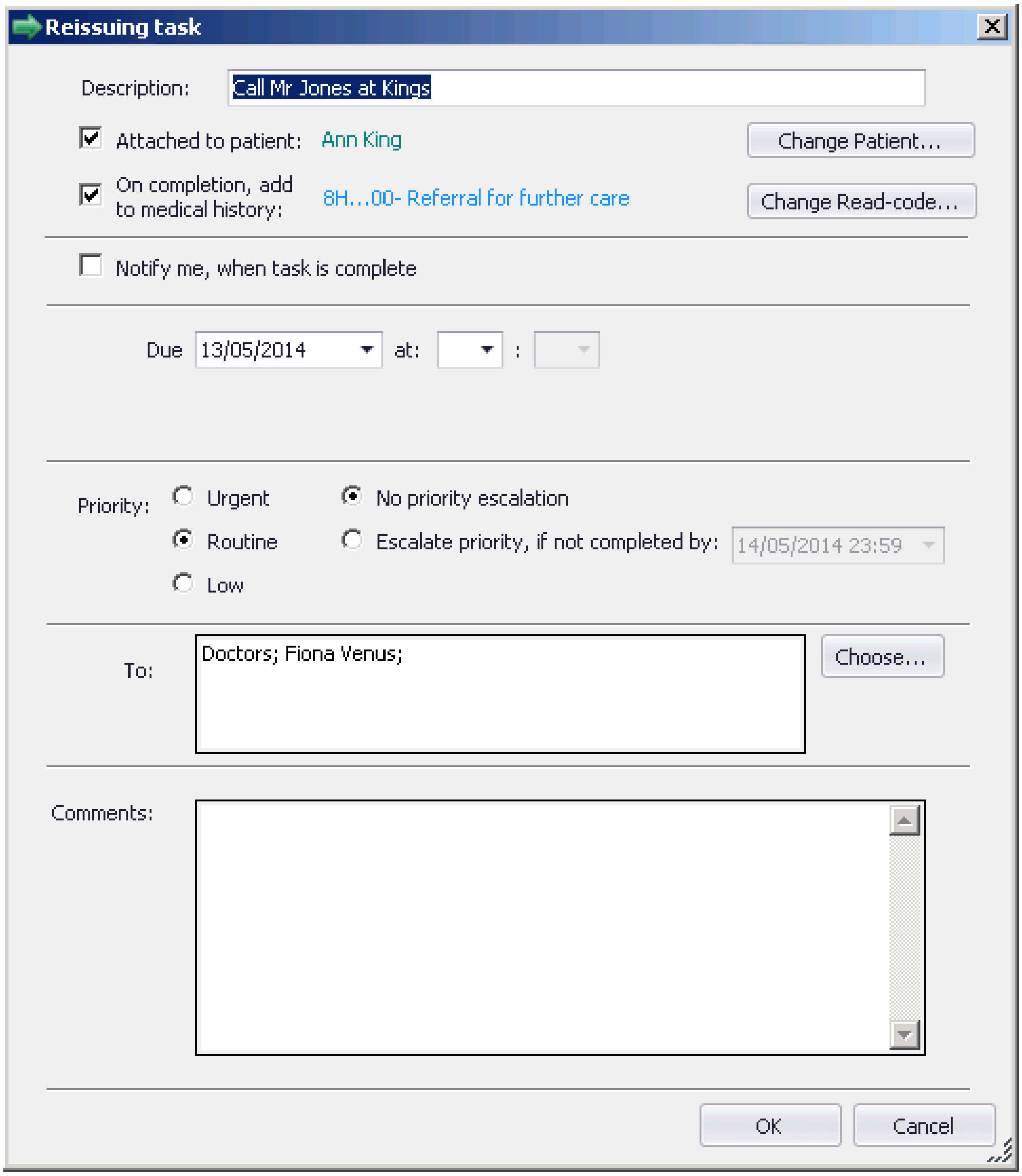
The **Tasks I've Actioned** tab lists all the tasks that you have been personally responsible for actioning (either completing or returning to sender). Tasks can be reissued from here:

1. From the **Tasks I've Actioned** tab, double click on the task and select 

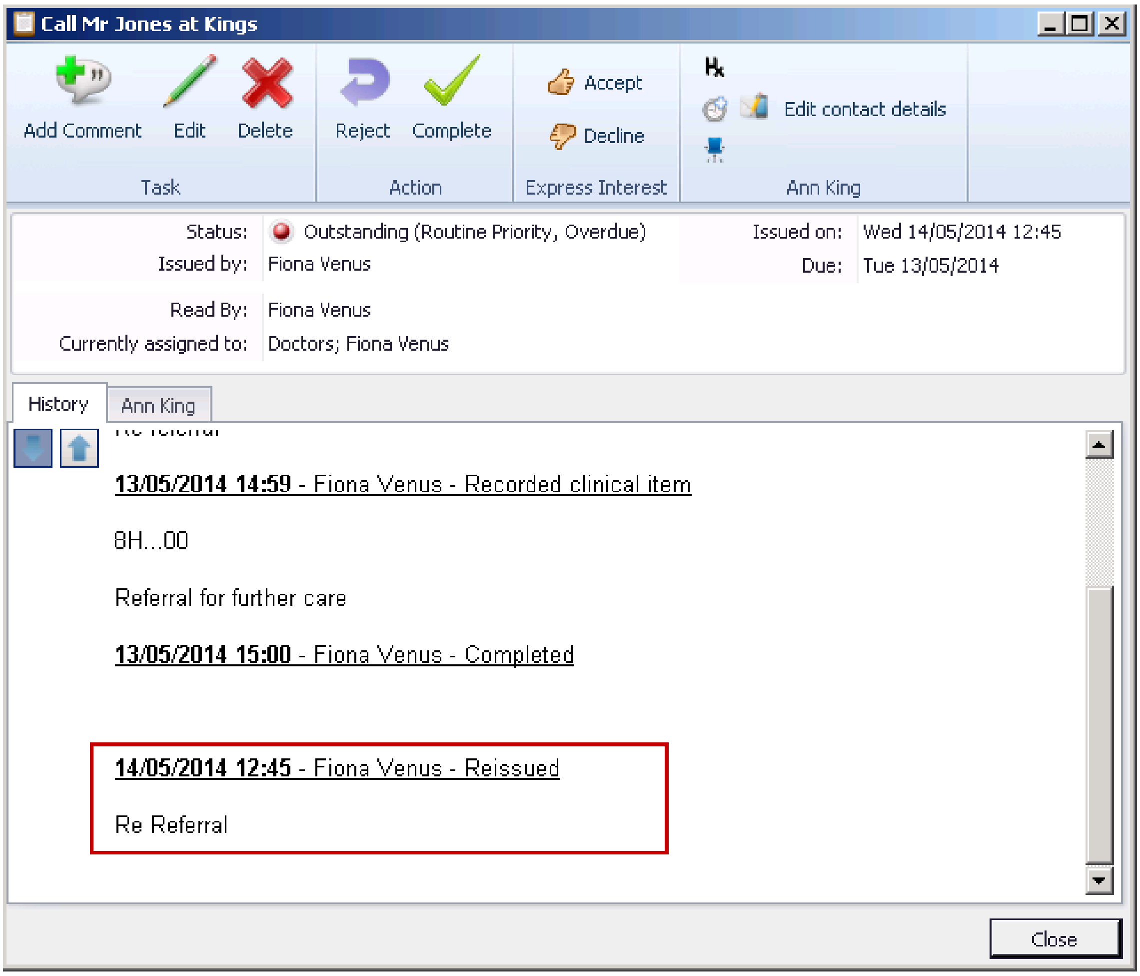
Reissue.



2. **Reissuing Task** is displayed; enter the task details as described in *Adding a Specific Action Task* (page 18).



3. Select **OK** to send and close. The History of the task is retained for audit purposes and the reissue is displayed in History.



All Outstanding Tasks

The **All Outstanding Tasks** tab displays all of the tasks that have not yet been completed. This is regardless of to whom they have been allocated, but does not include **Task for me** (self –assigned) tasks.

It is possible to claim and action any of these tasks, by double clicking on the task and processing in the usual way. See "*Actioning Tasks* (page 36)".

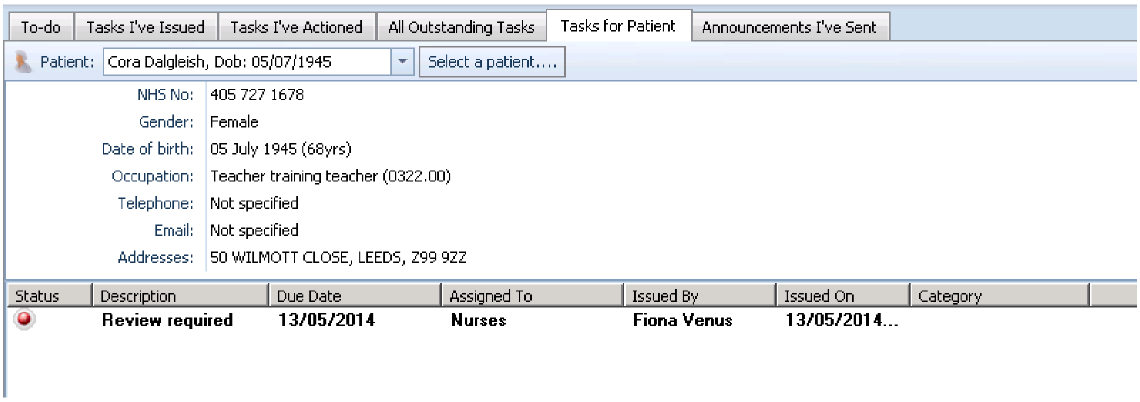
Note - Self-assigned tasks created by other users are considered private and do not appear on your **All Outstanding** tab. If however, a self-assigned task has been allocated to more than one person, it is displayed on every member of staff's **All Outstanding** tab.

Tasks for Patient

The **Tasks for Patient** tab allows you to view outstanding and completed tasks for a specific patient:

1. From any tab, press <F3>, or select the **Tasks for Patient** tab and select **Select a patient**.

2. Select Patient is displayed; select the **Search Attribute** required from the list and then type the search criteria into **Search Details** and select **Find.**
3. A list of patients that match your criteria is presented. Highlight the patient required and select **OK**.
4. The **Tasks for Patient** tab is displayed with all tasks available for the selected patient listed and the patient demographic displayed at the top of the list.

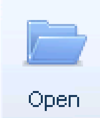


5. Double click on any of the tasks and action as appropriate.

Outstanding tasks for the patient are also displayed in Consultation Manager and Appointments. See *Managing Tasks from Consultation Manager* (page 48) and *Managing Tasks from Appointments* (page 49) for details.

Announcements I've Sent

This tab displays all the announcements you have created. The following actions can be made to Announcements:

- 

Open - Displays the announcement.
- 

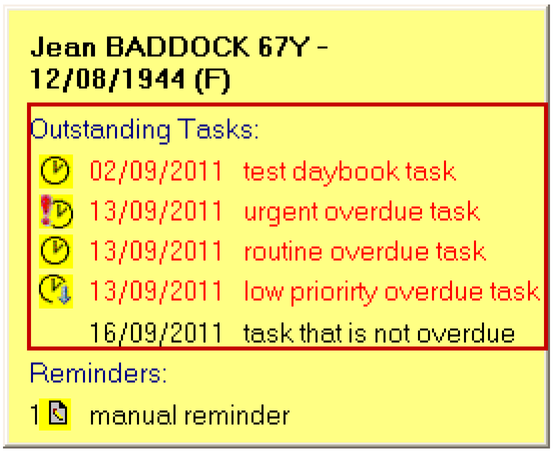
Add comment - Allows you to add comments to an announcement.
- 

Edit - Allows you to update the announcement (only available if you created the announcement).
- **Mark as unread** - Available from the right mouse menu, allows you to mark the announcement as unread.
- **Remove from list** - Available from the right mouse menu, allows you to remove an item from your list.
- 

Withdraw - Only available if you are the originator of the announcement, select **Withdraw** to remove the announcement across the practice.

Managing Tasks from Consultation Manager

Outstanding tasks are displayed at the top of Reminders within Consultation Manager on each patient.



To action a task from Consultation Manager:

1. Double click on the outstanding task.
2. The selected task is displayed.
3. Action the task in the usual way. See "*Actioning Tasks* (page 36)".

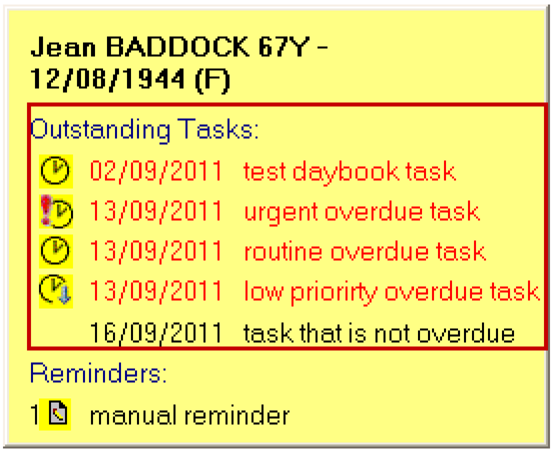
To view all tasks relevant to a selected patient from Consultation Manager:

1. From Consultation Manager, select **Tasks – View All Tasks**.

2. **All Tasks** is displayed.
3. To select and action a task, double click on the required task and action in the usual way. See "*Actioning Tasks* (page 36)".

Managing Tasks from Appointments

Outstanding tasks are displayed at the top of Reminders within Appointments.



To action a task from Appointments:

1. Right click on the outstanding task and select **Task details**.
2. Action the task in the usual way. See "*Actioning Tasks* (page 36)".

Managing Tasks from Mail Manager

Mail Manager contains the Auto-create set up options for specific Daybook tasks linked to messages your system can receive, see *Mail Manager Settings* (page 65). Tasks cannot be processed from Mail Manager.

- CDA messages

  – Auto-create 'Review clinical document' task

  – Auto-create 'Message assigned to deducted patient' task

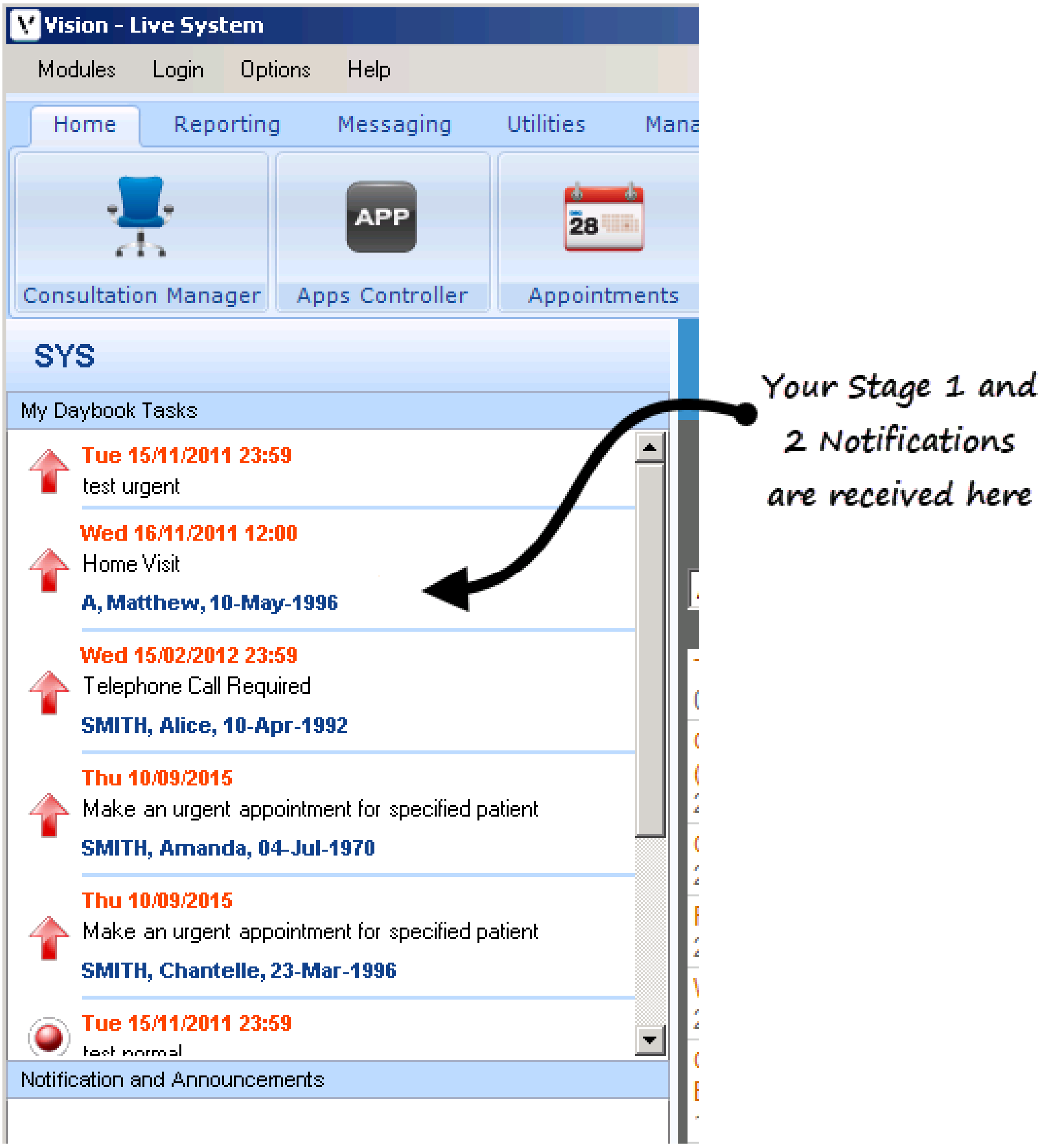
  – Auto-create 'Failed message validation' task

GPES Notifications (England)

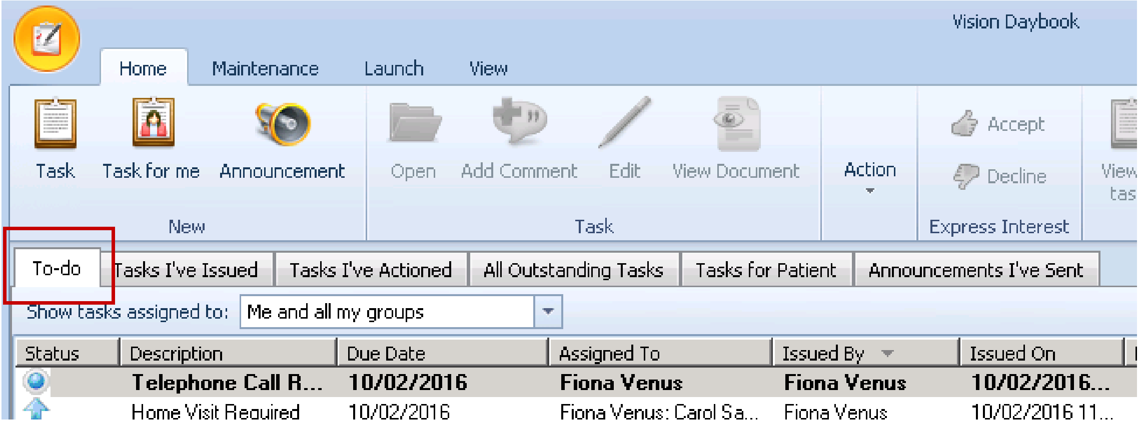
The General Practice Extraction Service in England sends permission requests in the form of Daybook messages which you need to approve before extracts can be run. See *GPES User Guide http://www.inps.co.uk/my-vision/user-guides-downloads/user-guides/regional-user-guides/england/gpes* for full details.

GPES *Stage 1* (page 52) and *Stage 2* (page 52) Notifications are added as Daybook tasks for all Vision users who are members of the "Gpes" group in Control Panel. If your Gpes staff group has not been populated, GPES Notifications appear in every staff members Daybook. All Notifications can be accessed from either:

- The Vision Front screen



- Your To-Do List tab in the Daybook Module



Stage 1 Notifications

There are two stage 1 notification message types:

- **Queries** - Received as Daybook tasks asking for your willingness to participate in an extract. The task must be processed in order for the extract to be scheduled and run.
- **Information only** - Received as Daybook tasks notifying you of an extraction due to be run.

From these notification messages, you can access a link to the NHS Digital website which gives further information about the contents of the extract. It is strongly advised that you review this information as some extracts may require patient identifiable information. You must be logged into Vision with your Smartcard with the relevant RBAC business functions to access these pages

Note - If you do not respond to a stage 1 notification before the extraction date detailed in the notification, GPES assumes that you do not authorise the extract to go ahead.

Stage 2 Notifications

Once GPES receives your extracted data, a Stage 2 Notification is sent back to Vision and is received as another Daybook task. These can be for:

- Information purposes only
- Authorising a release of your data
- Stopping the release of your extract

Processing GPES Notifications

Note - Only one member of the Gpes staff group has to process each task.

Depending on the system you are using for task management either:

- **Daybook** - See Processing GPES Notifications in Daybook
- **Tasks** - See Processing GPES Notifications in Tasks

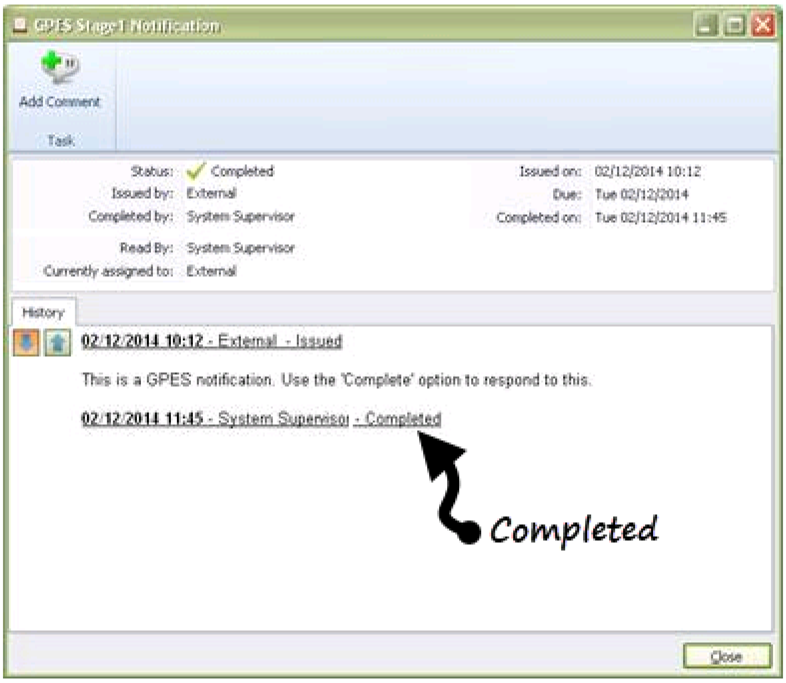
Deleting GPES Tasks

As some GPES stage 1 and 2 notification tasks cannot be completed, there is now a facility to delete GPES tasks to enable you to remove them from the To-do list of all those that are in your practice GPES group.

To delete a GPES task:

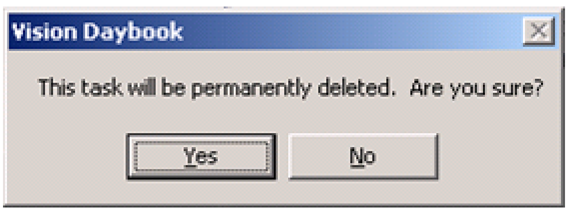
1. From **Daybook**, initially attempt to complete a GPES task in the same way as you complete any Daybook task.

   Remember - A completed task displays as Completed in the **History**.



2. If when you attempt to complete a GPES task you are presented with the following message *"The GPES Notification details are no longer available, please delete the task."*:

3. Right click on the task and select **Delete** to remove it from the **To-do** list of all those that are in your practice GPES group.
4. The *'This task will be permanently deleted. Are you sure?'* message is displayed.



5. Select **Yes** to delete the task.

Important - If you delete a task there is no Audit trail.

Managing SCR Error Message Tasks and Notifications (England)

Daybook and SCR

The following tasks and notifications are created in Daybook as a result of SCR activity in Vision:

- **ACS Mismatch Tasks** (page 54) - For patients with a consent preference of "Dissent" if the local consent record does not match the Spine an ACS mismatch is created.
- **PDS Mismatch Tasks** (page 56) - For patients whose local demographic details do not match the Spine, a PDS Mismatch is displayed each time the patient is selected until the PDS mismatch is resolved. If the patient is "Unlinked" SCR messages cannot be sent until the mismatch is resolved.
- **Queued items have been sent Notification** **(page 59)** - When a user works offline, any SCR updates will be queued until the user next logs in with their Smartcard. When the queued message is successfully sent a Daybook notification is delivered to the originator of the SCR message to inform them their patient's SCR update has been sent. The notification may contain multiple patient details, dependant on the items queued.

Note - Queued items that are manually sent using the Queued GP Summary utility will not generate a Daybook notification.

- **Notification of Transmission errors** (page 59) - If a message could not be sent correctly then a Daybook task is created so that action can be taken by a system administrator or other nominated person. If there are many failures, then these will be grouped together in a single notification.

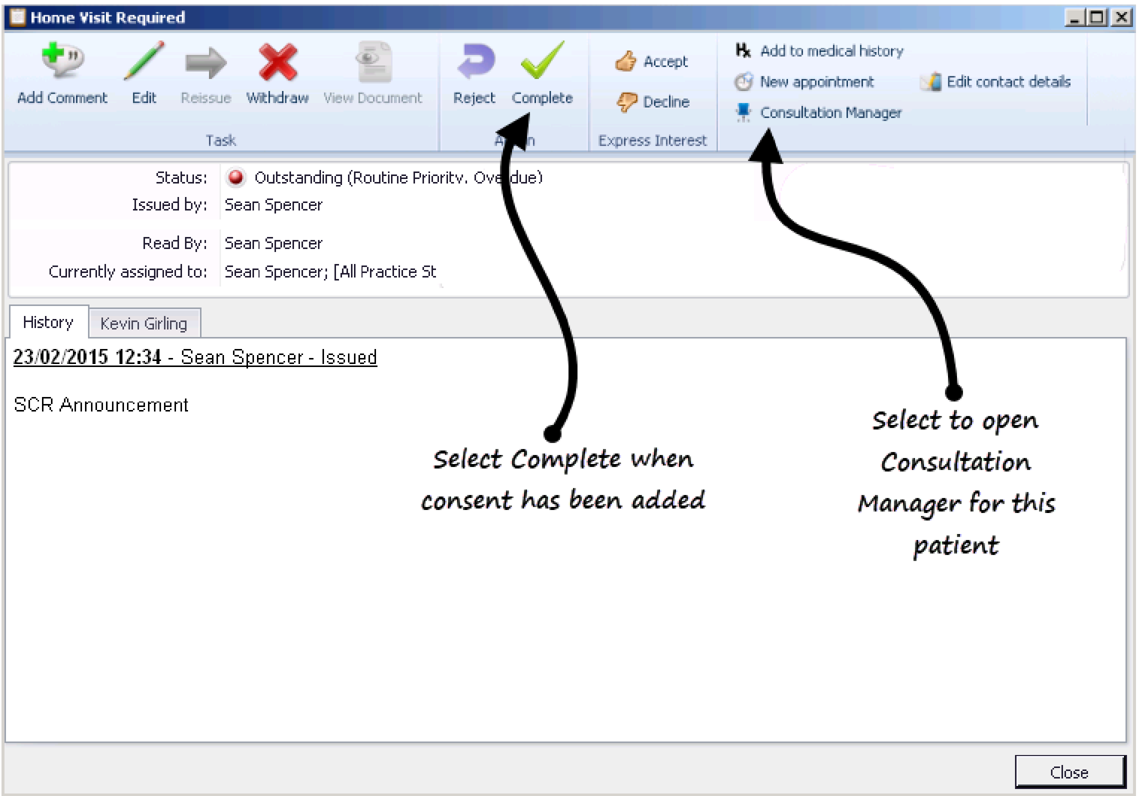
SCR task notifications are sent to all daybook users. If you would rather the Daybook notifications were sent to specific staff to be resolved rather than all of the practice staff and Clinicians, you can create a SCR group in Control Panel and add relevant staff to the group. See Create a SCR Group in Control Panel onscreen help.

ACS Mismatches

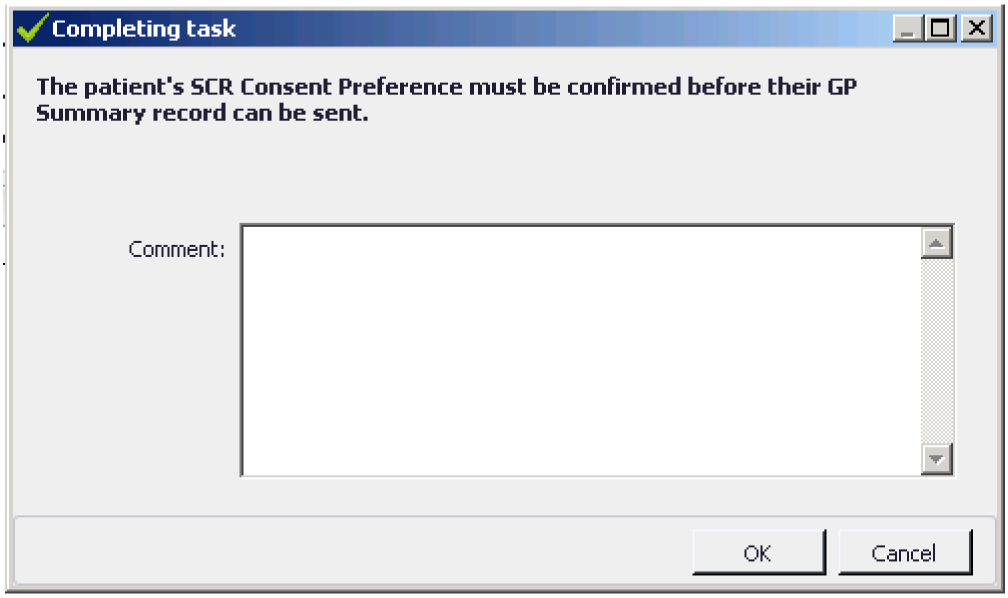
For patients with a consent preference of "Dissent" if the local consent record does not match the Spine an ACS mismatch is created each time the patient is selected in Consultation Manager until the consent mismatch is resolved. These messages are sent to all staff unless you have created a SCR group, see Create a SCR Group in Control Panel onscreen help.

1. From **Daybook - To-do**, double click to open the **Consent (ACS) mismatch message**.

2. Select **Consultation Manager**  to open the patient's medical records. Check and resolve the patients consent details. See SCR Quick Reference - Consent Model user guide on the Vision website for further details.



3. Return to the Daybook task and select **Complete** , a comment can be added to the Comment box if required. Eg Patient dissent recorded. Select **OK**.



4. Select **Close**. The completed task can be viewed on the **Tasks I've Actioned** tab.

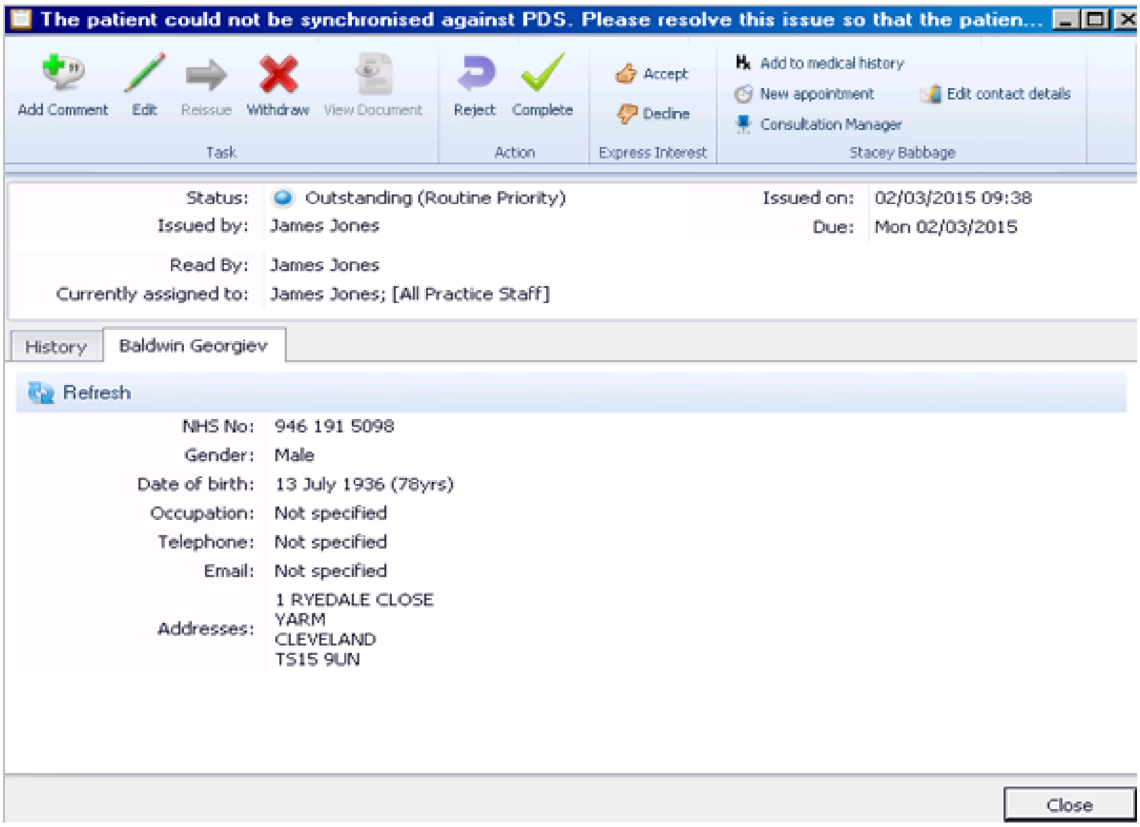
PDS Mismatches

For patients whose local demographic details do not match the Spine, a PDS/Vision Mismatch is displayed each time the patient is selected until the PDS mismatch is resolved. If you choose to defer a mismatch, a SCR/PDS synchronisation is done automatically. If the patient is successfully synchronised "Identity Confirmed" is displayed in Consultation Manager. If unsuccessful, the patient is "Unlinked" and SCR updates cannot be sent until the mismatch is resolved. See SCR PDS Synchronisation in Spine Services - England - Summary Care Record onscreen help for further details.

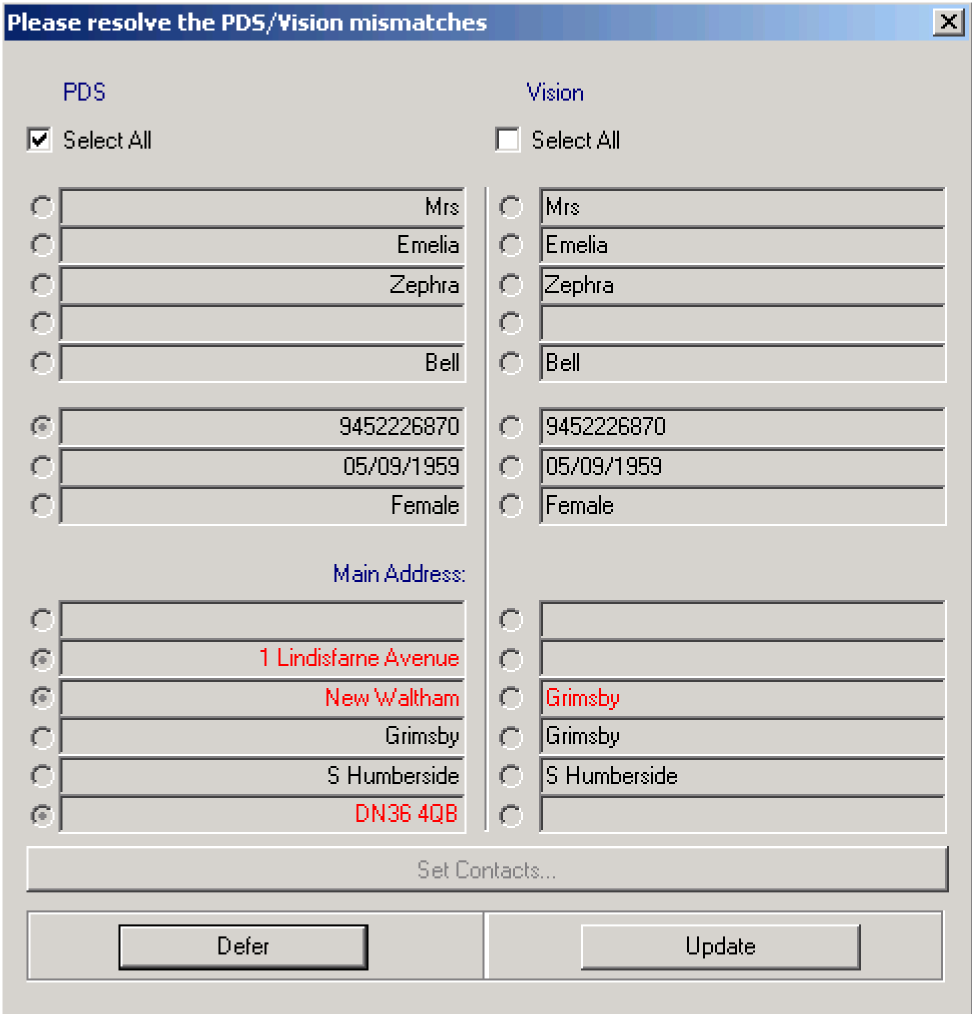
This is sent to all staff unless a SCR group has been created, see Create a SCR Group in Control Panel onscreen help.

To process a PDS Mismatch message:

1. From **Daybook - To-do**, double select to open the **PDS mismatch task**.
2. Select the Consultation Manager  link to open the patient's medical records.

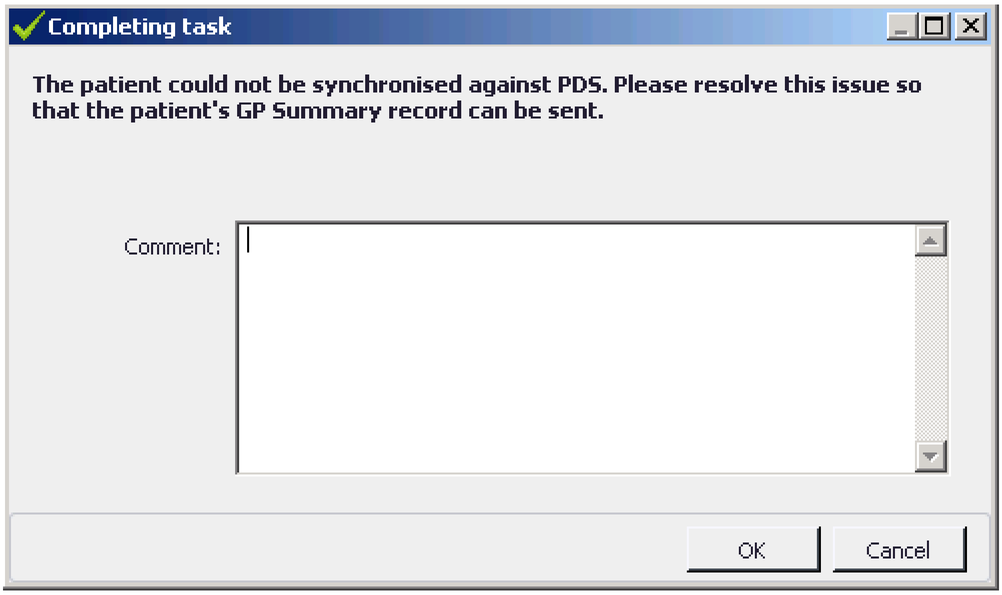


3. Check the PDS details displayed and Update if possible to resolve the mismatch.



4. Return to the Daybook task and select **Complete** 

, a comment can be added to the Comment box if required. Eg Patient's address details updated. Select **OK**.



5. Select **Close**. The completed task can be viewed on the Tasks I've Actioned tab.

Queued GP Summary Message were sent

When a user works offline, any SCR updates will be queued until the user next logs in with their Smartcard. When the queued message is successfully sent a Daybook notification is delivered to the originator of the SCR message to inform them their patient's SCR update has been sent. The notification may contain multiple patient details, dependant on the items queued.

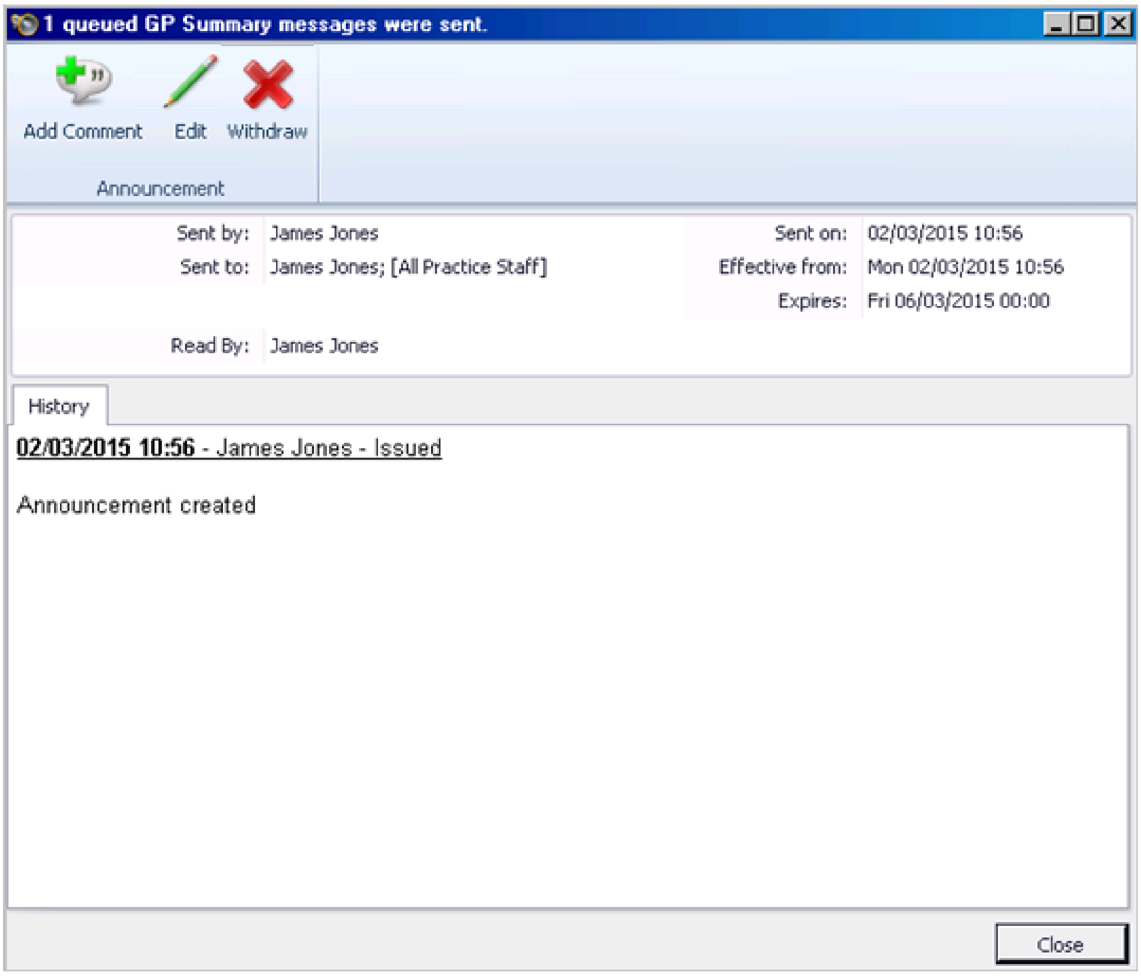
This message is sent to the originator of the SCR update, it is not sent to the SCR group.

See SCR Modules - Queued GP Summaries onscreen help for details of how to manually send all queued messages for the practice.

To process a Queued GP Summary notification:

1. In Daybook, double click to open the Queued GP Summary notification.
2. Check the details and add a comment if required.

   Important - The notification expires in four days.



3. Select **Close** to finish.

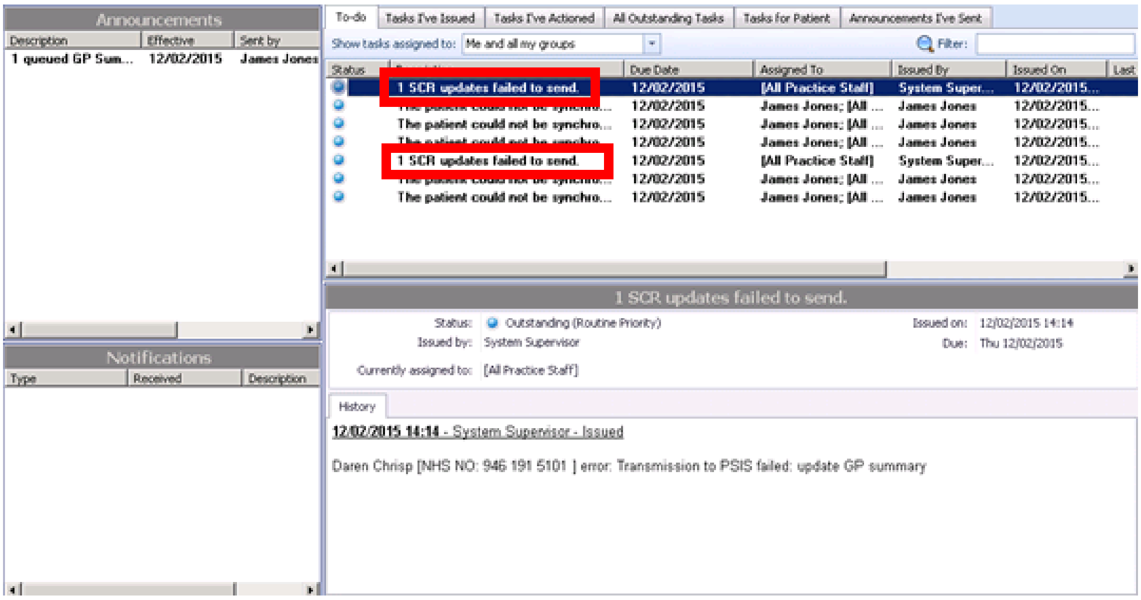
Transmission Errors

Daybook automatically creates a task when there is an error in transmitting SCR messages. The task may contain one or multiple errors. These tasks will be sent to all users unless you have created a $SCR group, see Create a SCR Group in Control Panel onscreen help.

Contact the Vision Helpline for assistance to resolve these issues.

The following are examples of transmission errors:

- **Message too large** - The GP Summary message is too large to send (Max 5MB). The GP Summary must be configured so that it contains fewer clinical entries.
- **Withdrawal error** - There was an error when processing a withdrawal of the SCR message.
- **Retry exceeded limit** - An SCR message transmission was retried over 3 times.



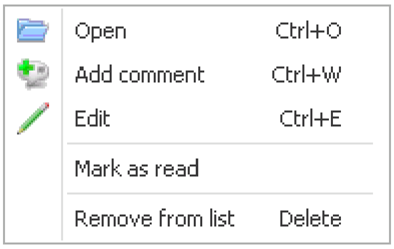
Managing Announcements

Announcements are displayed in the Announcements pane. They are for information and reference only and do not require actioning. As Announcements have an expiry date, you do not have to process them in any way, they are removed automatically when they expire. If however you wish to remove an Announcement:

1. From the **Announcement** pane, right click on the announcement you wish to remove.
2. Select **Remove from list**.

If you are the originator of an Announcement, you have the additional options from the right click menu:

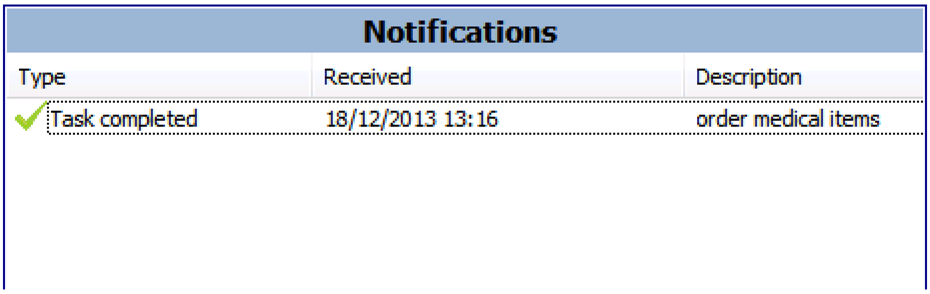
- **Add comment** - Use to add additional comments to an issued announcement.
- **Edit** - Use to alter an issued announcement.



Note – Once an announcement has been removed, you cannot republish it – you have to add a new announcement.

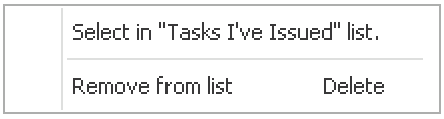
Managing Notifications

The Notifications pane displays messages that are created by Vision itself, these are known as Notifications:



To manage Notifications:

1. Right click on a Notification and select from the list displayed:



- **Show task in sent list** - This takes you to the original task you sent and is used for tasks you have initiated and that are overdue.
- **Remove from List** - This option deletes the notification.

Daybook Settings

You have various setting options within Daybook that should be considered:

- *Moving panes within Daybook* (page 63) allows you to change the way Daybook looks on an individual basis.
- *Daybook to open automatically* (page 65) to open Daybook on Vision log in.
- *Mail Manager Settings* (page 65) to auto-create tasks from messages received.
- *Security* (page 67) to ensure all staff have access to Daybook.
- Options:

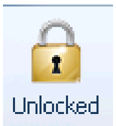
  – *Start up and alerts* (page 68) to select tab and refresh settings.

  – *Lists* (page 69) to select read times and set up Categories.

  – *Tasks* (page 69) to set Task Comment and notification options.
- *Practice settings* (page 70) to set your practice opening days.

Moving Panes Within Daybook

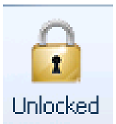
From **Daybook** - **View** there is a padlock button:

- 

 Lock window layout - Unlocked - You can change the positions of the panes.
- 

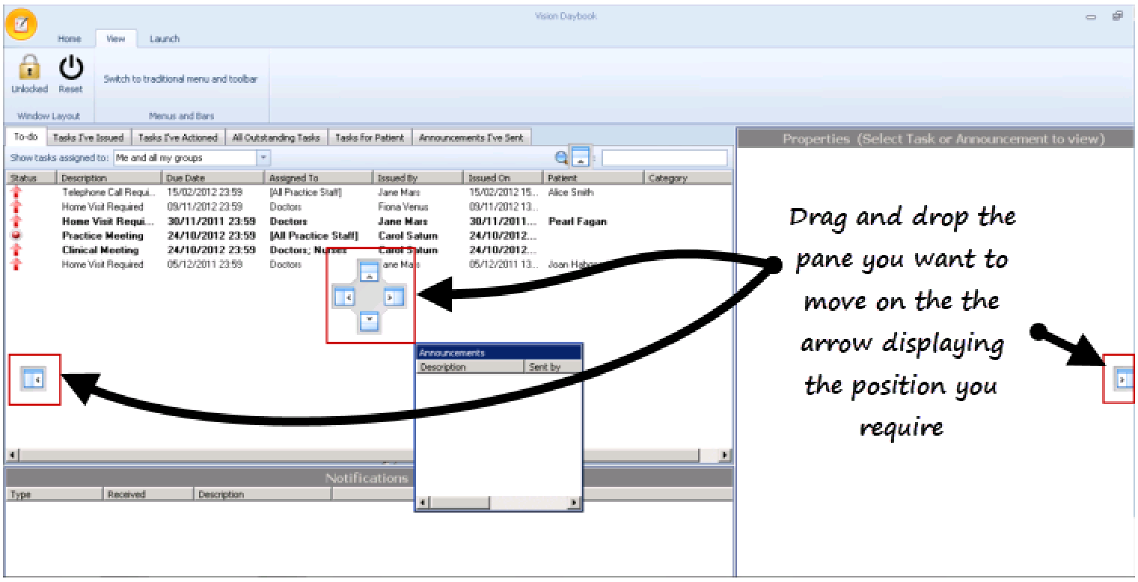
 Lock window layout - Lock - The panes are locked and cannot be moved.

To rearrange the various panes within your personal Daybook screen:

1. Ensure the padlock button is **Unlocked** 

, if not select **Lock** 

 to release it.
2. Click and drag the pane you wish to move.
3. Compass type arrows appear in the middle and at the edges of the screen.



4. Drop the pane you want to move on to the arrow displaying the position you require.
5. Repeat the moving process until the screen is displayed the way you require.
6. Select **Lock** 

 to save the screen.

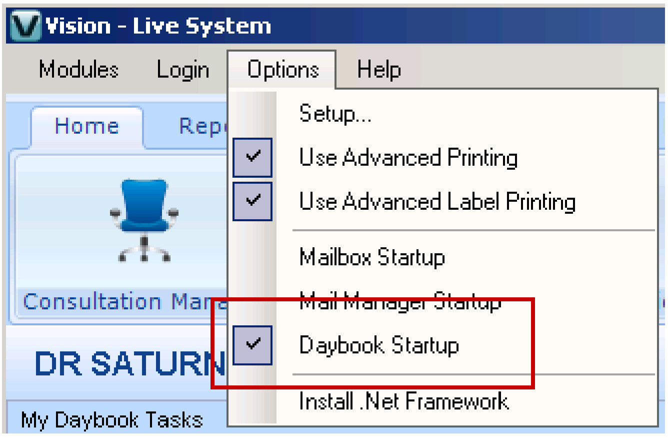
If you have locked the current layout, **Lock** 

is displayed in gold, select **Reset** 

to release the lock and to be able to move the panes again.

Daybook to Open Automatically

Daybook does not open automatically when you log into Vision, to set it to open automatically, from the Vision front menu, select **Options - Daybook Startup**. This is an individual setting.



Mail Manager Settings

Mail Manager contains the auto-create set up for Daybook tasks required for messages your system can receive:

- CDA messages:

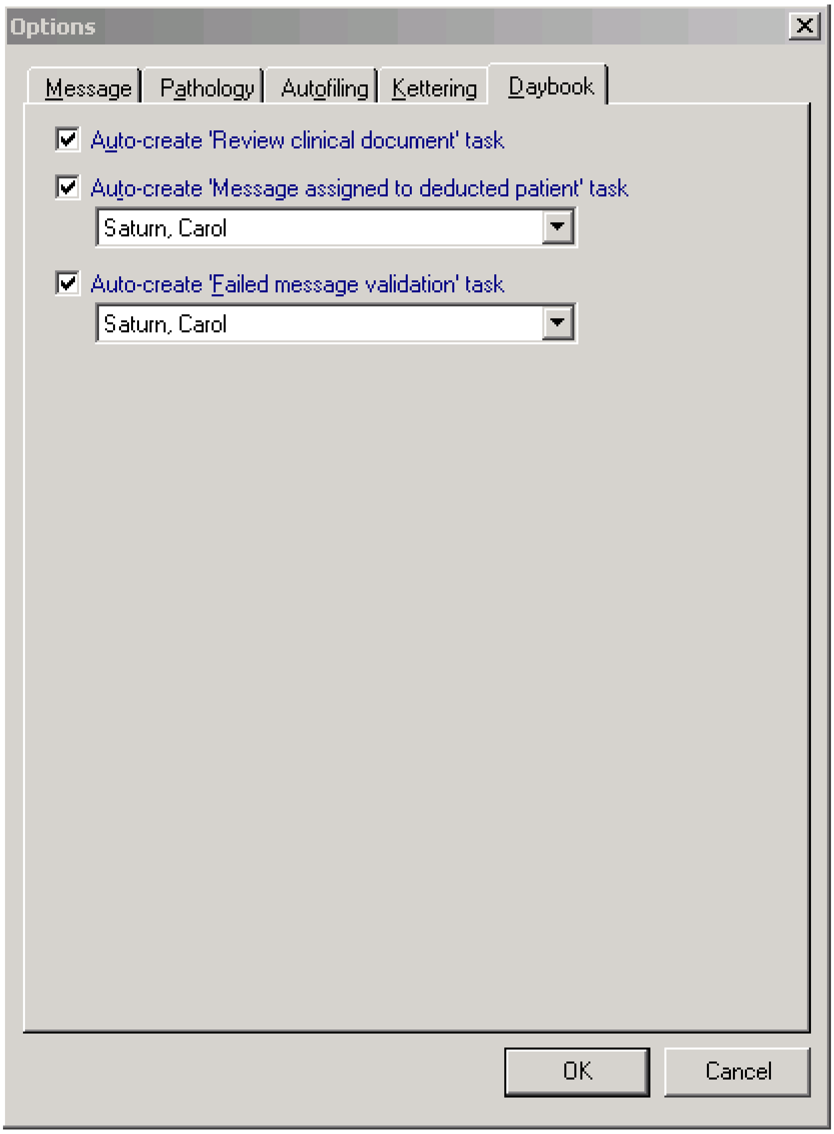
  – Auto-create 'Review clinical document' task

  – Auto-create 'Message assigned to deducted patient' task

  – Auto-create 'Failed message validation' task

To set up the auto-create options:

1. From Mail Manager, select Tools - Options and select on the Daybook tab.
2. Tick against the options you require and select the designated recipient of the task where appropriate:
   - **Auto-create 'Review clinical document' task**
   - **Auto-create 'Message assigned to deduct patient' task**
   - **Auto-create 'Failed message validation' task**



3. Select **OK** to save.

Security

Note – To change these settings, you must be logged into Vision as an Administrator.

Access to Daybook is managed from **Management Tools** – **Control Panel** – **Security**, see on-screen help for details. By default everyone has full access to Daybook; this should be left so that all staff can access their own tasks.

England

If you have Role Based Access Control (RBAC) enabled, you must ensure that you contact your Registration Authority (RA) to add Daybook access to all your staff. The RBAC activity linked to Vision Security Function for Daybook is:

- **B0093** Create Work Item

Options

To set up the options within Daybook:

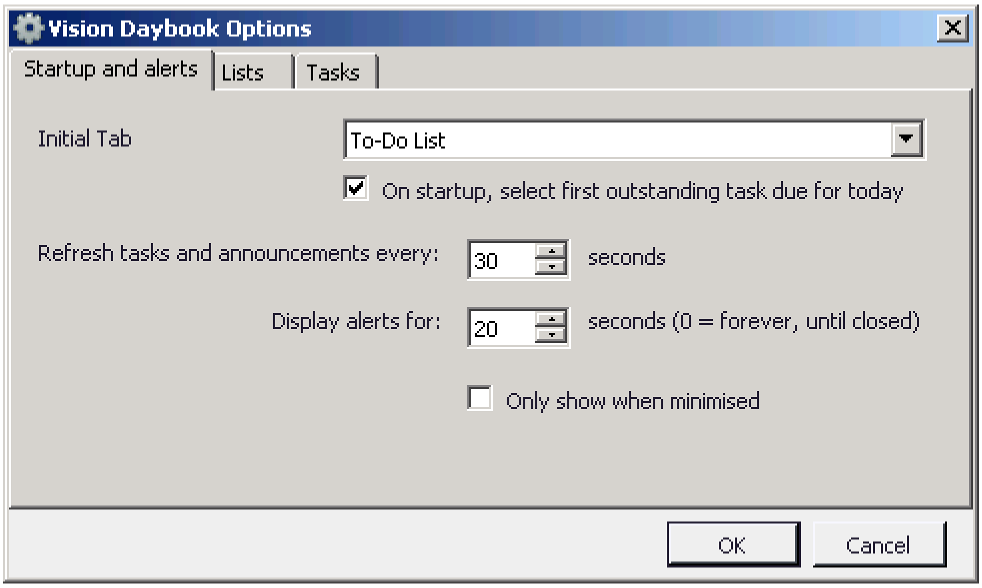
1. From **Daybook**, select the **Maintenance** tab and select **Options** .
2. The **Daybook Options** screen is displayed.

There are three tabs to allow you to personalise the way Daybook looks:

- *Start Up and Alerts* (page 68)
- *Lists* (page 69)
- *Tasks* (page 69)

Start Up and Alerts

From the Startup and Alerts tab:



- **Initial Tab** – Allows you to select the tab you wish to be initially presented with:

  – **To-Do** – lists outstanding tasks.

  – **Tasks I've Issued**– lists tasks you have created.

  – **Tasks I've Actioned** – lists completed tasks.

  – **All Outstanding Tasks** – lists all outstanding tasks for all staff.

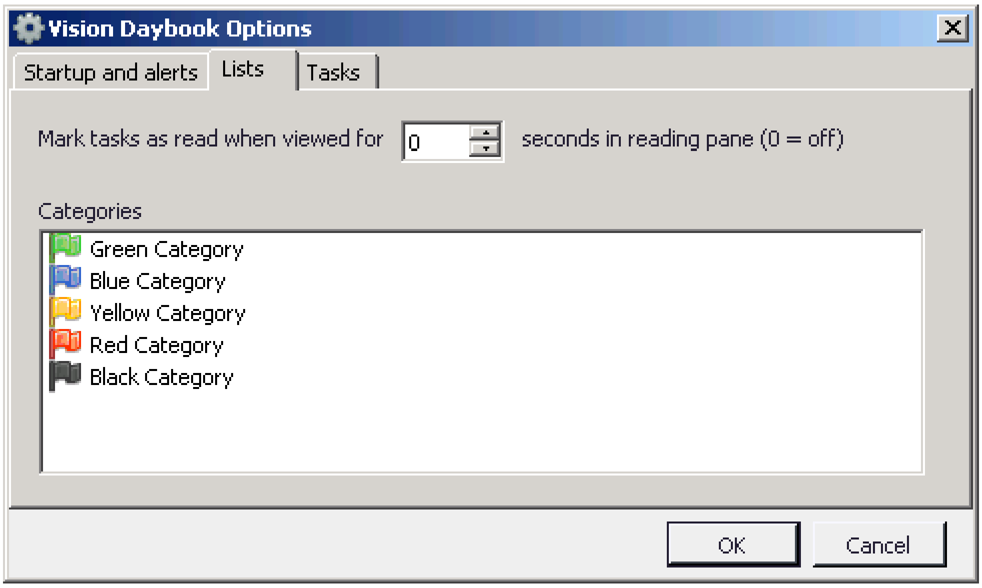
  – **Tasks for Patient** – lists tasks for a specific patient.

  – **Announcements I've Sent** - lists announcements you have sent.
- **On startup, select first outstanding task due for today** – Tick to display tasks that need to be dealt with today as the starting point within Daybook.
- **Refresh tasks and announcements every** - Using the up and down arrows, select a time period for Daybook to be refreshed.
- **Display alerts for** - Select a time for the system tray balloon tips (alerts) to display by using the up and down arrows. To set the alerts to stay on screen until manually closed, set to 0.

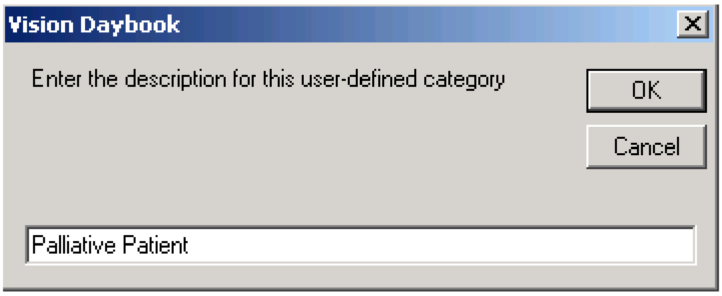
- **Only show alerts when minimised** – Tick this if you only require an alert to appear when Daybook is not maximised.

Lists

From the List tab:

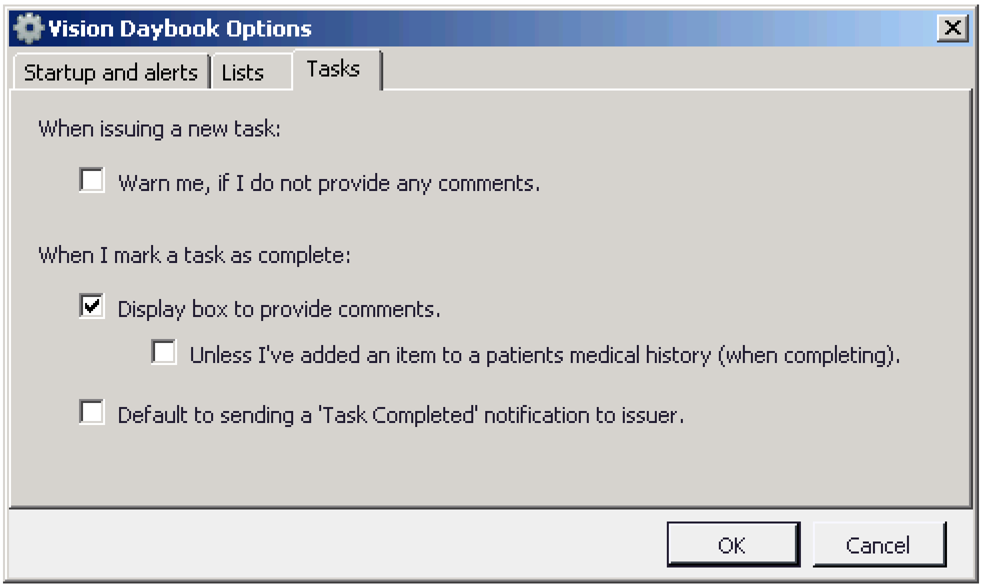


- **Mark tasks as read when viewed for nn seconds in reading pane** - Select the amount of time to view a task, by using the up and down arrows, before it is automatically marked as read (where nn is a number). Enter 0 to turn this option off and use the right click option to mark as Read.
- **Categories** – Each user can categorise their own tasks for your their own reference using different colour flags. The text associated with the flags is initially based on the colour of the flag, it is changed by right clicking on the flag and selecting **Rename**. Type in the new text and then select **OK** to save and close. To use the flags see "*User Specific Categories* (page 80)".



Tasks

From the **Tasks** tab you can set the following personal options for your individual Vision account:



- **When issuing a new task**:

  – Warn me, if I don't provide any comments - Select to prevent yourself from sending tasks with no comments.

- **When I mark a task as complete**:

  – **Display box to provide comments** - Tick to automatically display a comments box when you complete a task, this can be a useful option for audit purposes.

  – **Unless I've added an item to a patients' medical history (when completing)** - If you have selected the "Display box to provide comments" option, you can tick this option if a medical history entry has been automatically made, as an additional comment should not be necessary for audit purposes.

- **Default to sending a 'Task Completed' notification to issuer** - Tick to send a completion notification to the originator of a task each time you complete a task.

Practice Settings

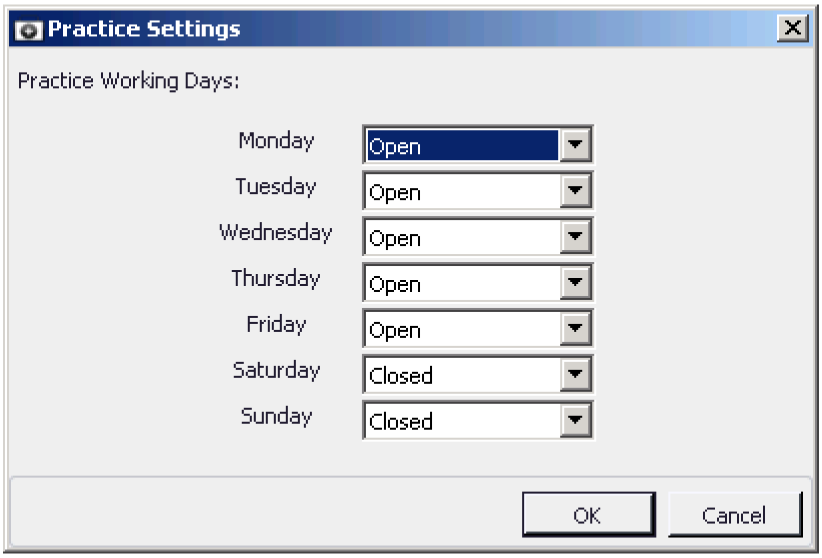
Practice settings are used by Daybook to work out when a task is due; it enables the system to skip weekends when a due date is entered as nn days (where nn is a number).

1. From **Daybook**, select the **Maintenance** tab and select **Practice Settings** 

.

2. The **Practice Settings** screen is displayed. The default is Open every day

3. Using the available lists of **Open** and **Closed**, select the days your surgery is closed.



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

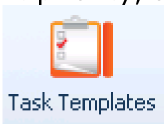
Important – This is a Practice wide setting, not an individual setting.

Task Utilities

Within Daybook there are several utilities that assist in the day to day running and management of tasks:

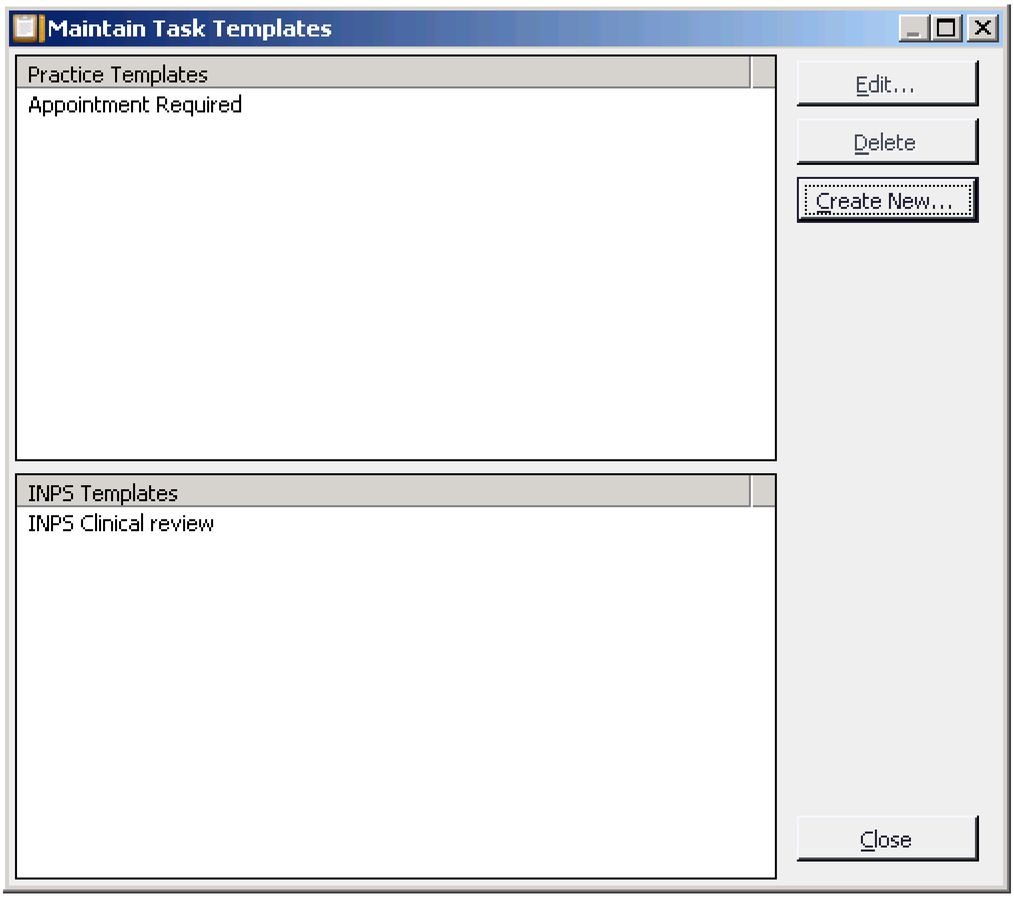
- *Task Templates* (page 72, *http://www.inpshelp.co.uk/DLM470/Daybook/index.htm#26847*) – Enables templates to be set up for common tasks.
- *Maintain Frequent Task List* (page 78) – Ensures the templates you use most are offered first.
- *User Specific Categories* (page 80) – Allows you to colour code for your own tasks.
- *Out of Office* **(page 81)** – Notifies anyone allocating a task to you that you are not available.
- *Archive Old Tasks* (page 83)– Enables you to set an individual archiving protocol to manage your initiated tasks.

Task Templates

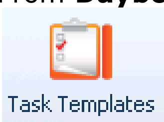
Many tasks have certain things in common, eg Make an urgent appointment always has a patient attached, always has an Urgent priority, and may always be assigned to the same staff group. **Task Templates** 

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. - See INPS Templates for details.

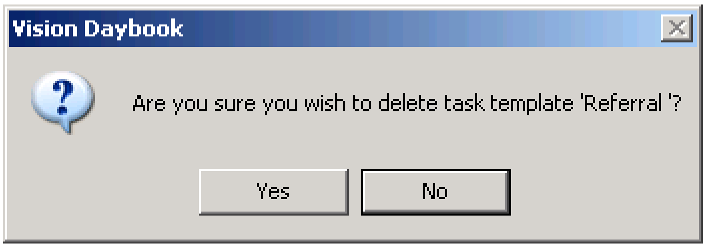


To create or maintain Task Templates:

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

.
2. Select the action you require:
   - **Create New** - To add a new practice template, select **Create New**. See *Adding a New Practice Template* (page 74).

- **Edit** - To change an existing template, select the template and select **Edit**. Change details as required and then select **Finish** to save and close.
- **Delete** - To delete an existing template, select the template and select **Delete**. Select **Yes** to the confirmation message.



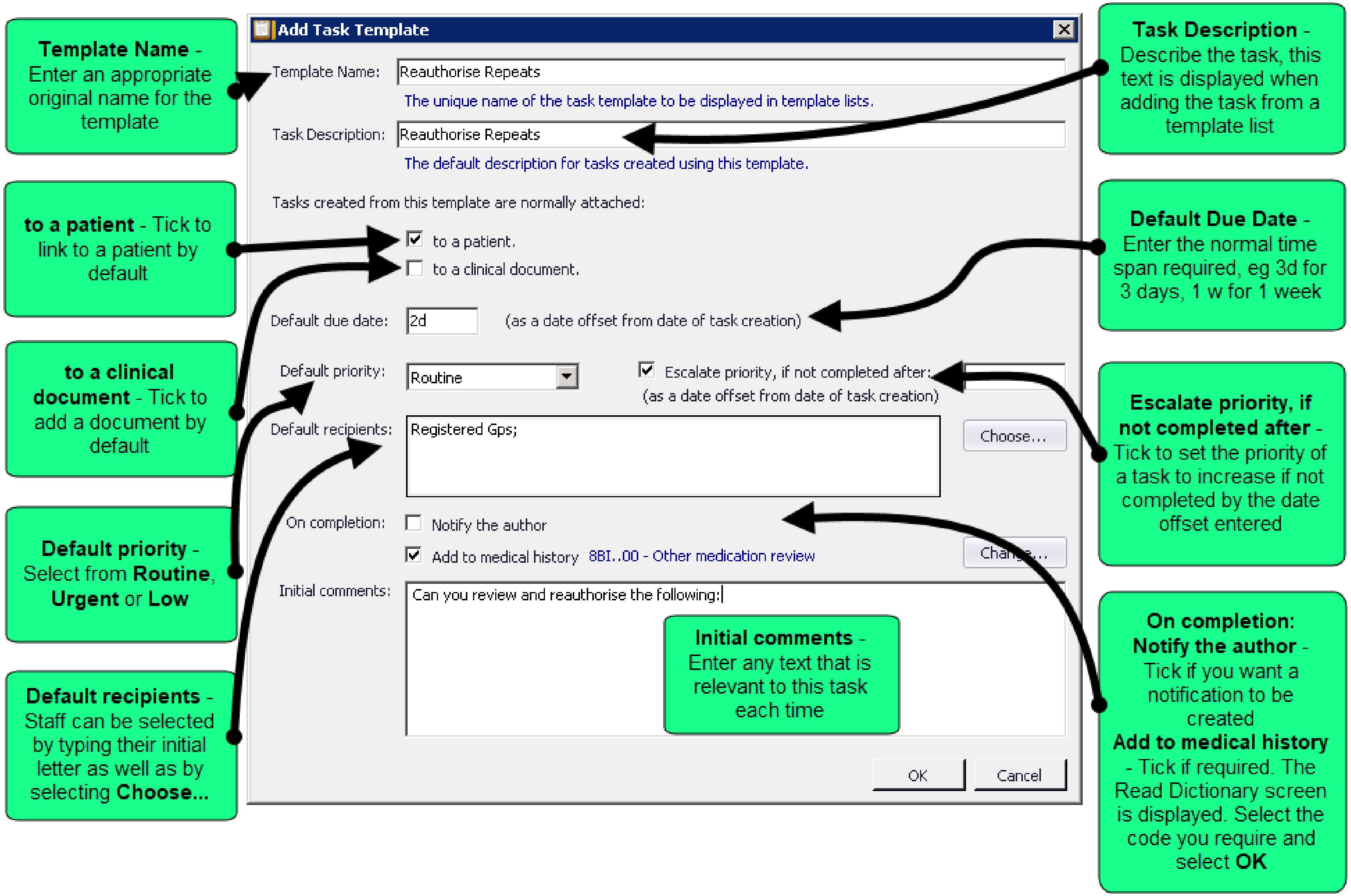
> **Note** - You cannot delete INPS Templates.

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 duplicate Templates.

1. From **Daybook**, select **Task Templates**  and select **Create New**  .
2. The **Add Task Template** screen is displayed.


Add Task Template
Template Name: Reauthorise Repeats
The unique name of the task template to be displayed in template lists.
Task Description: Reauthorise Repeats
The default description for tasks created using this template.
Tasks created from this template are normally attached:
to a patient.
to a clinical document.
Default due date: 2d (as a date offset from date of task creation)
Default priority: Routine
Escalate priority, if not completed after:
(as a date offset from date of task creation)
Default recipients: Registered Gps;
Choose...
On completion: Notify the author
Add to medical history 8BI..00 - Other medication review
Change...
Initial comments: Can you review and reauthorise the following:
OK
Cancel
Template Name - Enter an appropriate original name for the template
to a patient - Tick to link to a patient by default
to a clinical document - Tick to add a document by default
Default priority - Select from Routine, Urgent or Low
Default recipients - Staff can be selected by typing their initial letter as well as by selecting Choose...
Task Description - Describe the task, this text is displayed when adding the task from a template list
Default Due Date - Enter the normal time span required, eg 3d for 3 days, 1 w for 1 week
Escalate priority, if not completed after - Tick to set the priority of a task to increase if not completed by the date offset entered
Initial comments - Enter any text that is relevant to this task each time
On completion: Notify the author - Tick if you want a notification to be created
Add to medical history - Tick if required. The Read Dictionary screen is displayed. Select the code you require and select OK

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 is displayed 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, eg 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 on **Choose...**:.

   Remember – Staff Groups are set up through 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 is displayed. 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.

INPS Templates

The following system created templates are available and should be viewed and edited where appropriate to fit your practice protocols:

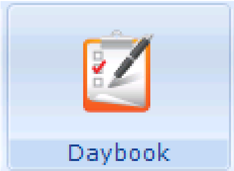
- **INPS Clinical review**, see *Setting up the Clinical Review Daybook Task Template* (page 76)

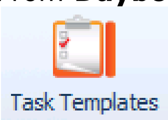
Setting up the Clinical Review Task Template

Daybook

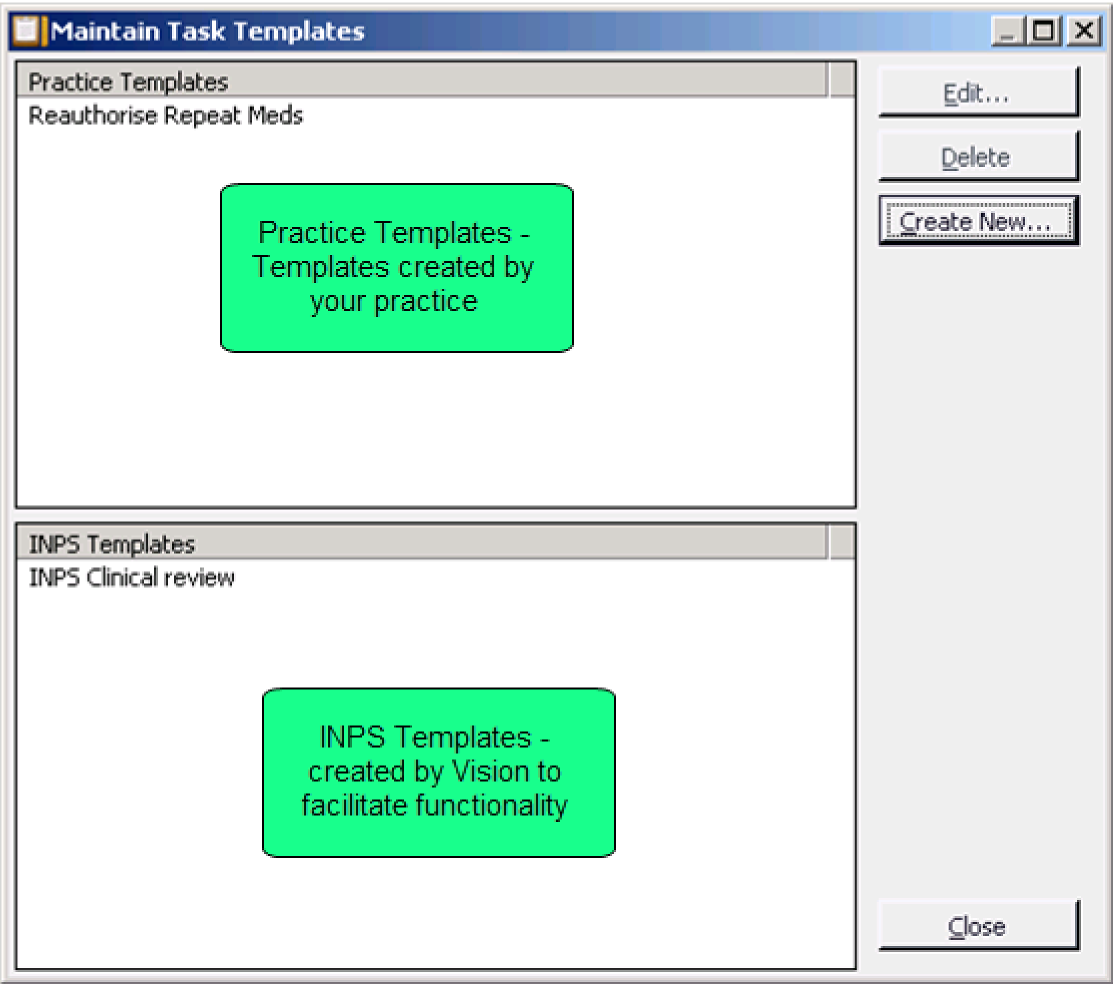
When messages are received a **Clinical Review Daybook** task can be automatically created to notify the message recipient. This task is based on the **INPS Clinical Review** task template. This template must be reviewed and updated to match your practice protocols.

To review and update the **INPS Clinical Review** task template:

1. From **Daybook** 

, select **Maintenance - Task Templates** 

.
2. **Maintain Task Templates** is displayed.

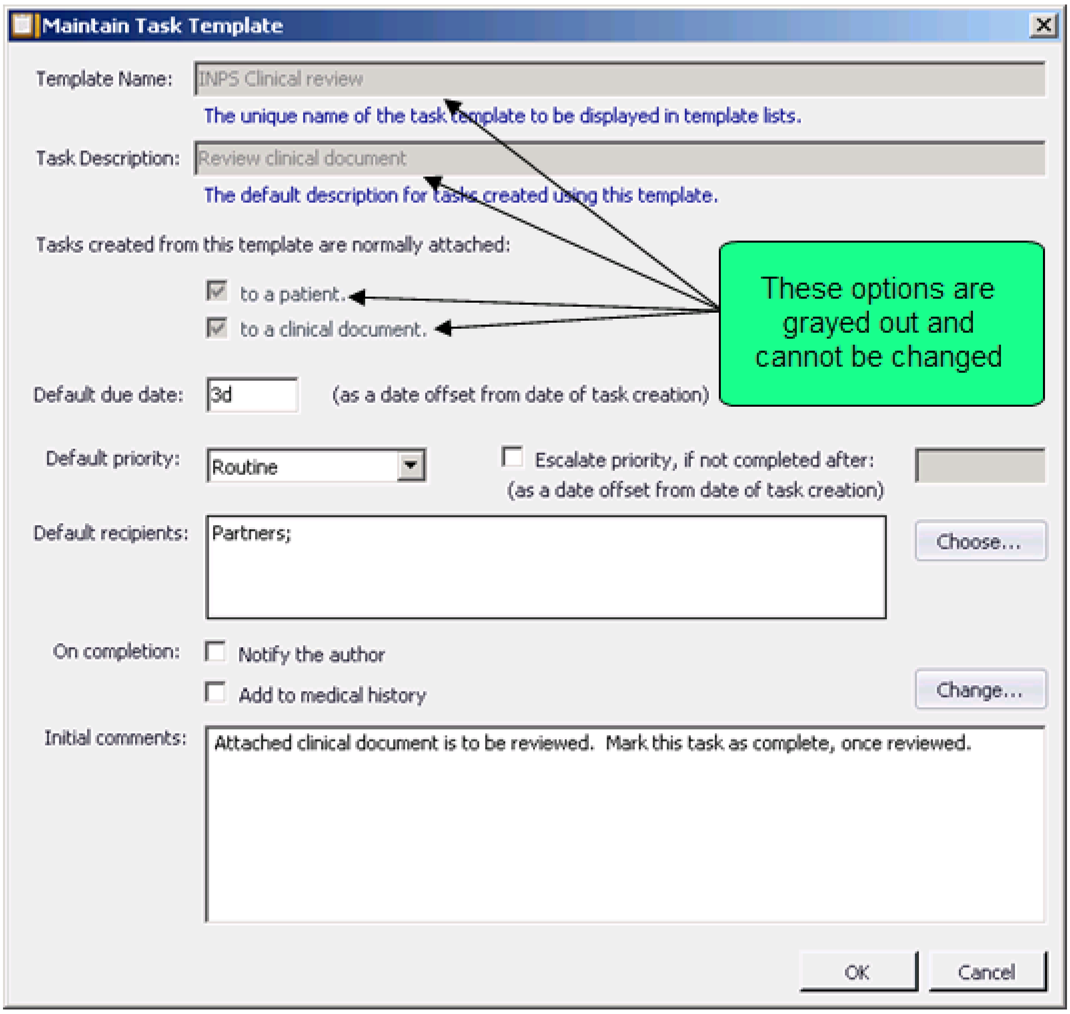


3. From **INPS Templates**, highlight the **INPS Clinical Review** template and select **Edit**.
4. The **Maintain Task Templates screen** is displayed.
5. The following options are completed automatically on your behalf:

- **Template name** - INPS Clinical review
- **Task Description** - Review clinical document
- **Tasks created from this template are normally attached**

  – to a patient

  – to a clinical document



Update the remaining options to match your practice protocols.

Important - It is highly recommended that you add default recipients to this template. Clinical Review tasks are always assigned to the staff who is allocated to the message, in case of staff absence it is useful to have at least one other member of staff receive the Clinical Review tasks. This is especially useful for messages that are not automatically allocated to staff.

Change the **Initial comments** if required.

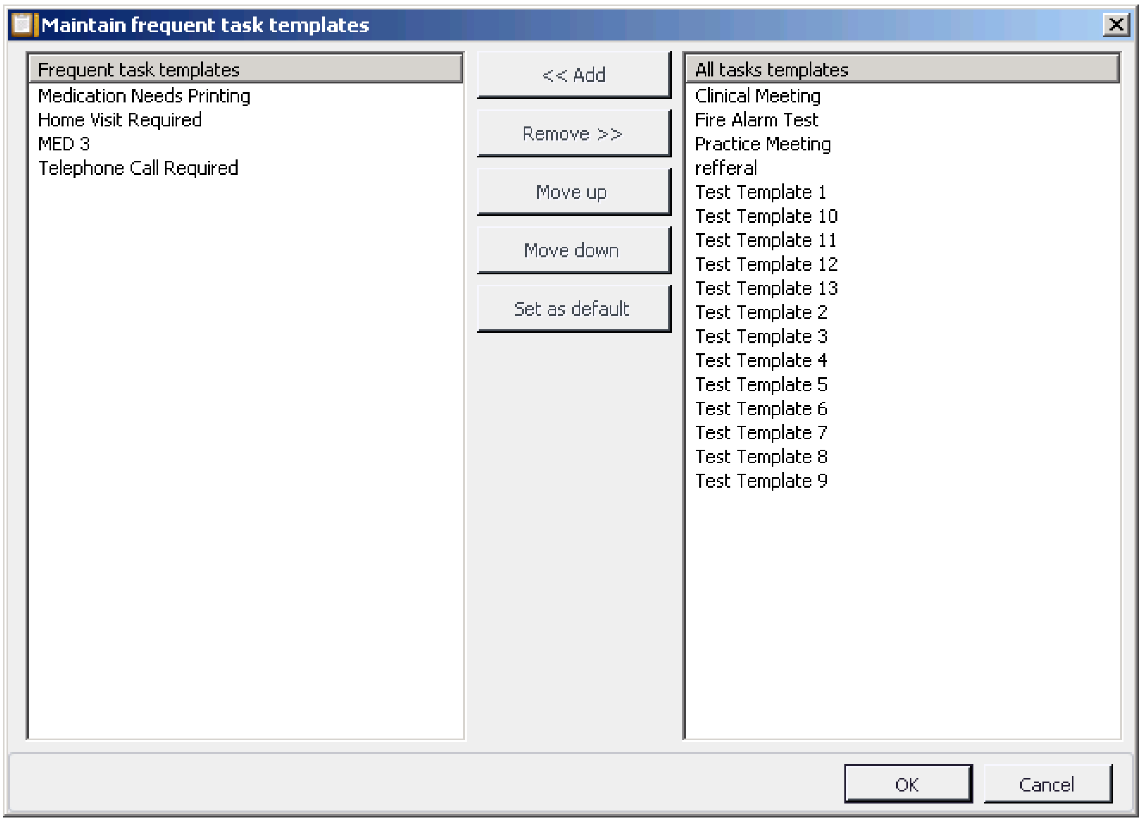
6. Select **OK**.

Maintain Frequent Task Templates

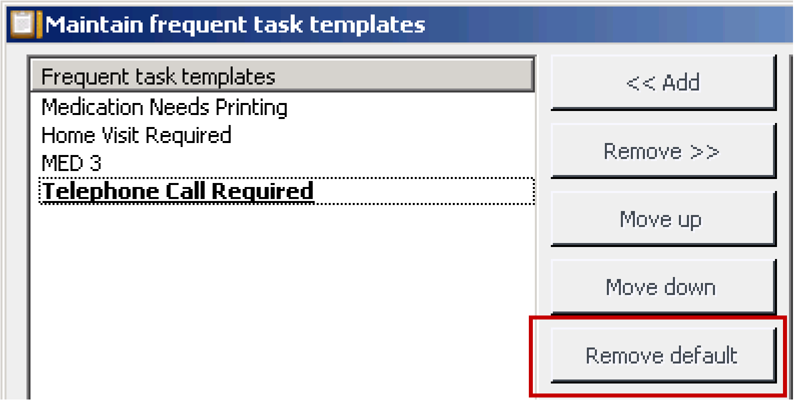
This function allows the most frequently used templates to be offered first when a new task is added.

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

.
2. The **Maintain Frequent Task templates** screen is displayed.



3. All available task templates are listed under **All tasks templates:**
   - Select the template you want to promote to the **Frequent Task List** and select **<<Add**.
   - Repeat step 3 until all the frequently used templates are listed under **Frequent task templates**.
   - To promote or demote templates within the **Frequent Task List**, highlight the task required and then select **Move up** or **Move down**.
   - To remove task templates from the **Frequent Task List**, highlight them and select **Remove>>**.
   - To set a default task, eg the task template you want to be offered when you select Task each time, highlight the task you require and select **Set a default.** Once selected, the task is highlighted in bold and underlined. To remove the default, highlight the defaulted task and select **Remove default**.



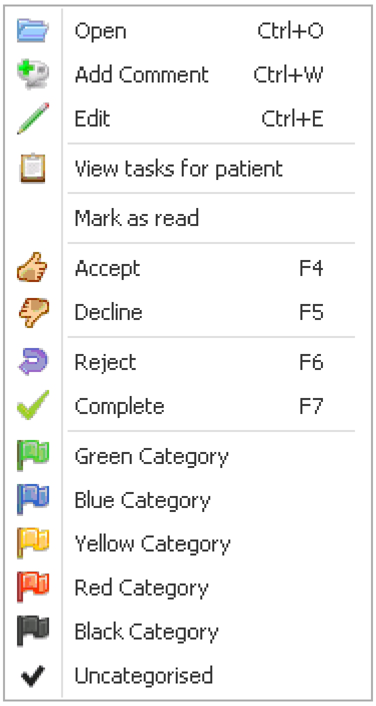
4. Select **OK** to save and close.

User Specific Categories

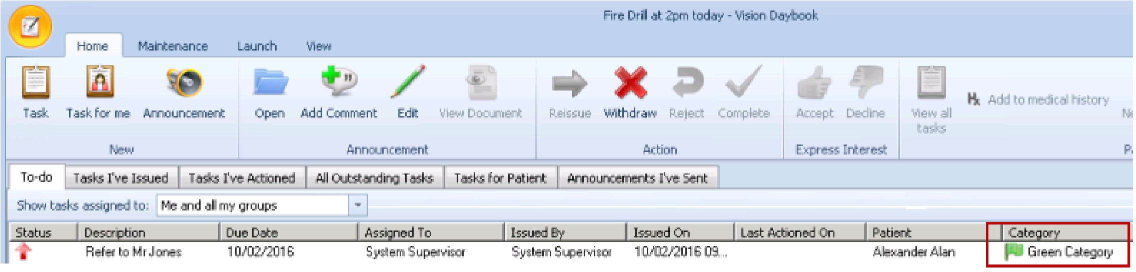
You can categorise tasks to fit your own criteria on your **To-Do** tab. The categories have default names but these can be changed, see *Options - Lists* (page 68) for further details.

To update the category of a task:

1. From any of your task tabs where you can see the task required, right click on the task.
2. Select the Category you require.



3. The task displays with the relevant colour in the Category column. This can then be displayed in category order by clicking **Category**.



Out of Office

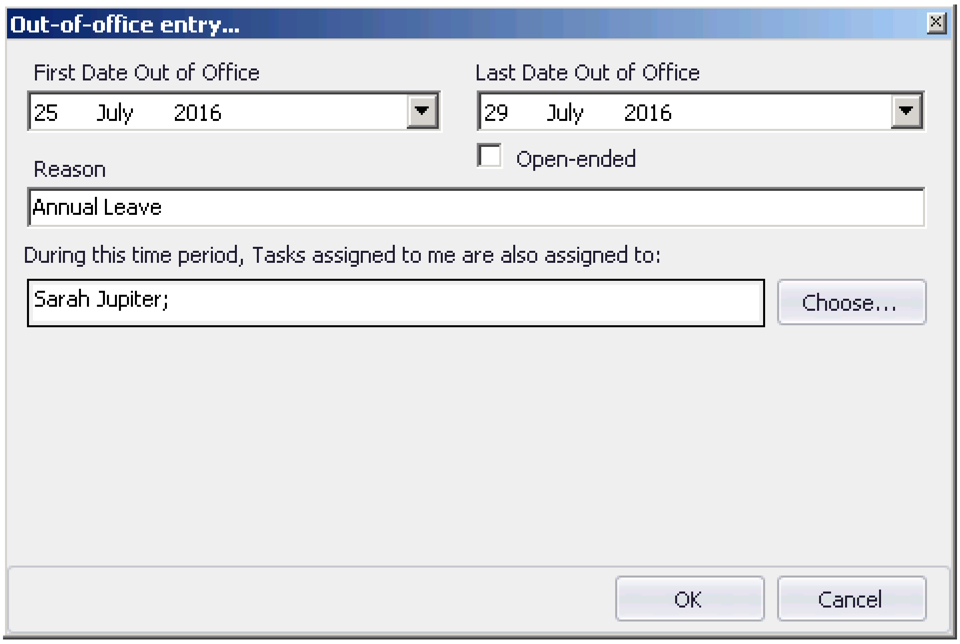
You can set a number of Out of Office flags help manage tasks allocated to you when you are not available.

Note - This facility can only be set up by the individual concerned.

Setting up an Out of Office

1. From **Daybook**, select the **Maintenance** tab and select **Out of Office** 

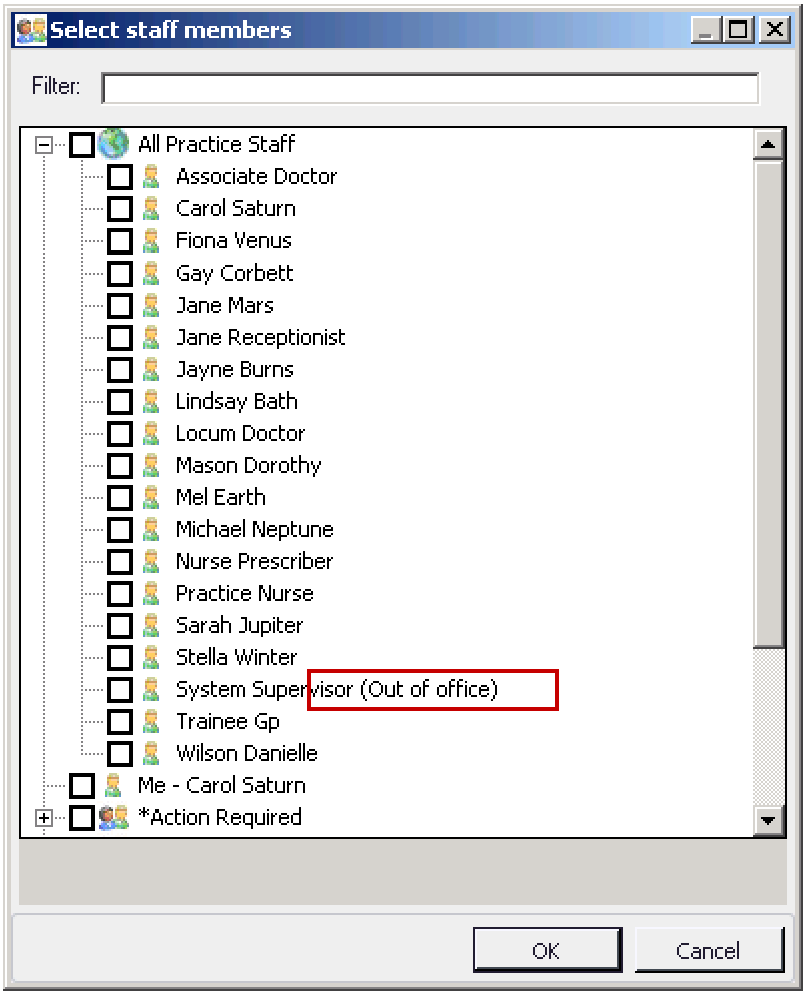
.
2. Select **Add**.
3. Select the first date of absence in **First Date Out of Office** and then either select a date in **Last Date Out of Office** or tick in **Open-ended**.
4. Add a description in **Reason** as required, eg Annual Leave.
5. If required, select **Choose** to select a member of staff to receive a copy of your Tasks while you are away.



6. Select **OK**.
7. Repeat steps 2, 3 and 4 if adding more than one period of absence.

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

If a member of staff has set an Out of Office, they are displayed on the User Selection list with **(Out of office)**.



Note – Out of Office flags are for reference only. Allocated tasks are still sent to recipients that have an Out of Office flag set.

Editing an Out of Office

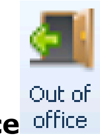
To edit an existing out of office entry:

1. From **Daybook**, select the **Maintenance** tab and select **Out of Office** .
2. Highlight the Out of Office that needs editing and select **Edit**.
3. The Out of office entry is displayed, update as required.
4. Select **OK**.
5. Select **OK** to save and close.

Deleting an Out of Office

Note – Expired Out of Office flags are removed from the system automatically.

To delete an existing out of office entry:

1. From **Daybook**, select the **Maintenance** tab and select **Out of Office** 

.
2. Highlight the Out of Office that needs deleting and select **Remove**.
3. An Out of Office Settings message is displayed stating "*Selected entries will be removed. Are you sure?*"

4. Select **Yes** to confirm.
5. Select **OK** to save and close.

Archive Old Tasks

In order that Daybook does not become unusable due to the amount of old tasks, an archive protocol should be decided on. By default, completed tasks are archived after 30 days. However, you can change these settings.

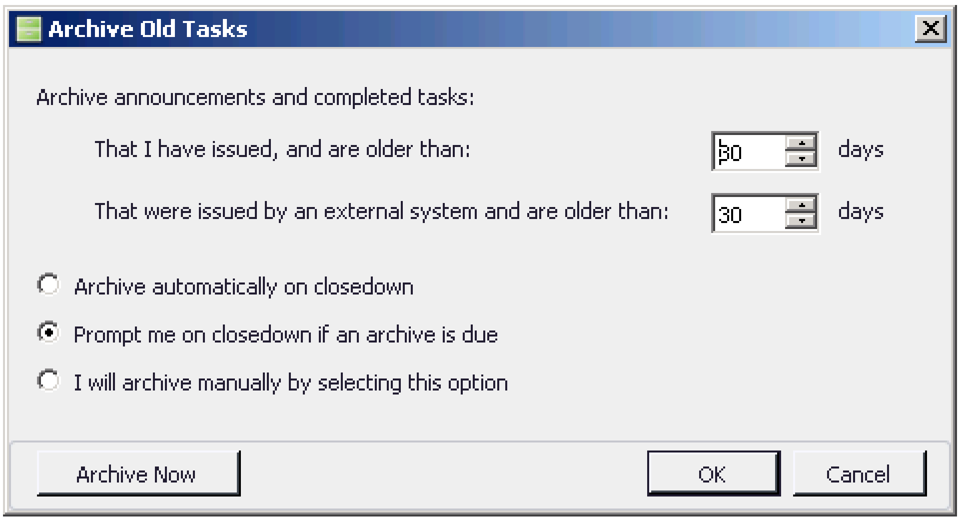
Important – Archive is a personal setting. The items archived are the Tasks assigned by you only, therefore a practice policy should be decided upon to standardise this function.

Archiving Tasks

To set up an archive:

1. From **Daybook**, select the **Maintenance** tab and select **Archive** 

.
2. The **Archive Old Tasks** screen is displayed.
3. From **Archive announcements and completed tasks:** select:
   - **That I have issued, and are older than** - by either over typing the number of days, or using the arrows. The default here is 30 days.
   - **That were issued by an external system and are older than** - by either over typing the number of days, or using the arrows. The default here is 30 days. This currently includes Tasks received via Mail Manager eg CDA messages, SCR messages and GPES messages
4. Select how you want the archiving to take place by selecting one of the following:
   - **Archive automatically on closedown**.
   - **Prompt me on closedown if an archive is due**.
   - **I will archive manually by selecting this option** – use the **Archive Now** button to do this.
5. Select on **OK**.



Viewing Archived Tasks

1. From **Daybook**, select the **Maintenance** tab and select **Archive View** 

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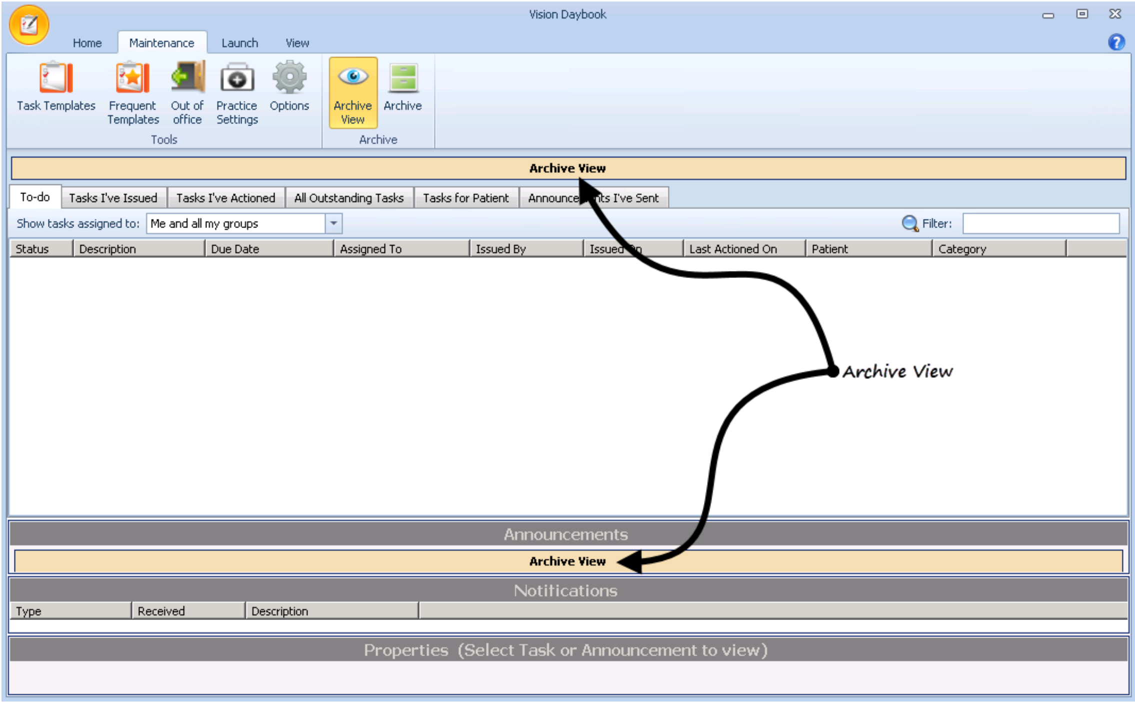
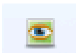
2. Archived tasks are now displayed on the Daybook screen, and an Archive View banner is added to the top of Task and Announcement panes.



3. Archived items are read only. To restore an item from Archive, right click on it and select **Restore**.

To close the **Archive View**, select **Archive View**  again.

Appendix 1 – Daybook Task Scenarios

The following scenarios demonstrate how Daybook could be used within your Practice.

Note - These examples are designed for use **after** you have received basic training on Daybook and are a reminder of how useful Daybook can be.

Visit Request

A patient has phoned to say he is suffering severe abdominal pains and needs an urgent GP visit:

Reception

- From **Daybook**, press **<F2>** to create a new task.
- Select **Template** (or leave default), select the patient, leave **Due** date as today, set **Priority** to **Urgent**, from **To** select all the practice GP's, add **Comments** "Suffering from abdominal pains and needs urgent visit" and select **OK**.

Clinician

- From **Daybook**, select the **To-do** tab.
- Select the new task (sent to the GP's group) by double clicking on it.
- Select **Accept** and select "*I shall deal with this task, assign it exclusively to me*" select **OK.**
- Select **Add Comment** and enter "Can be with the patient in 30 mins", select **OK** and then **Close**.

Clinician on return from visit

- From **Daybook - To-Do** tab double click on the same task and select **Complete.**
- Enter comments if required, select **OK** to save and complete the task.
- Select **Close**.

Reception

- You can see from Daybook which clinician has accepted the task and are notified when it is completed.

Phone Message

Dr X's patient has called to say that their new tablets are causing vomiting, and so they would like some advice:

Reception

- From **Daybook**, press <F2> to create a new task.
- Select **Template** (or leave default), in **Description** type "Please call", select the patient, leave the **Due** date as today, set **Priority** to **Routine**, from **To** select Dr X, add **Comments** "New tablets causing vomiting, would like some advice". Select **OK**.

Clinician

- From **Daybook**, select the **To-Do** tab.
- Select the new task by double clicking on it, in **Comments** type "Called patient at 13.30, got no reply" select **Save** and then **Close**.
- Later select the task again by double clicking on it, select **Reject**, type "Called patient at 15.00, got no reply - Please assign to Dr Y as I am finished for the day". Select **OK** and **Close**.

Reception

- From **Daybook**, select the **To-Do** tab.
- Double click on the returned task and select **Reissue.**
- In **To** select Dr Y, select **OK.**

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