
Daybook - Day to Day Use

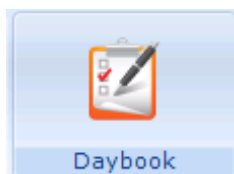
Daybook Hotkeys

F1	On-screen Help
F2	New task
Ctrl+F2	New self-assigned task
Ctrl+F3	New announcement
F4	Accepts a task
F5	Declines a task
F6	Returns a task
F7	Starts completion of a task
F8	New appointment for selected patient
F9	New medical history for selected patient

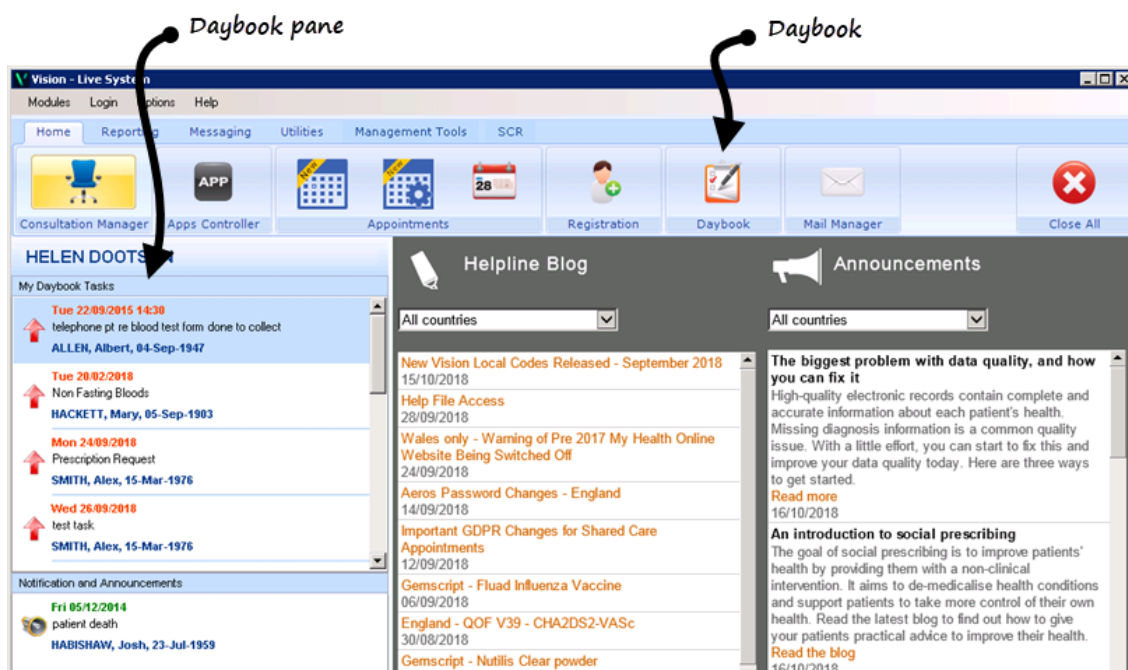
Accessing Daybook


From the Daybook Pane on your Vision front screen either:

- Double click on the task you require within the **Daybook Pane**, or



- Select **Daybook**




 **Training Tip** - Remember you can set Daybook to open at Vision Start up, simply select **Options - Daybook Startup**.

Creating a Task

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

1. From **Daybook**, select **Task** .

 **Training Tip** - You can also add a task from **Consultation Manager** and **Appointments**.

2. The **Issuing New Task** screen is displayed:

Issuing New Task

Based upon template:

Description:

Issued by:

Attached to patient:

On completion, add to medical history

Attached to document

Notify me, when task is complete

Due at: :

Priority: Urgent No priority escalation Escalate priority, if not completed by:

Routine Low

To:

Comments:

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

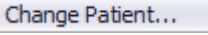
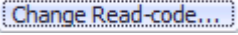
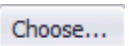
To - Select the recipients you require


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.
- **More** – Allows you to select any predefined Task.

 **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 choose a patient select **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**  and select a Read code in the usual way.
- **Attached to document** - Tick to attach this task to a document on the selected patient's record.
- **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**
 - **Routine**
 - **Low**
 - **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.

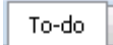
- **Comments** – Enter free text as required. If this task is linked to a patient, you can press the **Insert** key to list their medical records, select a record to insert in the text and select **OK** to save and return to the task. The Insert process can be repeated to add more than one medical record.
- **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).

Actioning a Task

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.
3. The task is displayed:

4. Action the item as required:



- **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.



- **Withdraw** - Only available if you are the originator of the task, use to withdraw the task.



- **View Document**- Select to view the attached document.




- **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.

 **Training Tip** - Remember tasks you have completed are viewable from your **Tasks I've Actioned** tab.



- **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, see [Returning/Rejecting a Task](#) (page 7) for details.



- **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.


5. 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.

Returning/Rejecting a Task

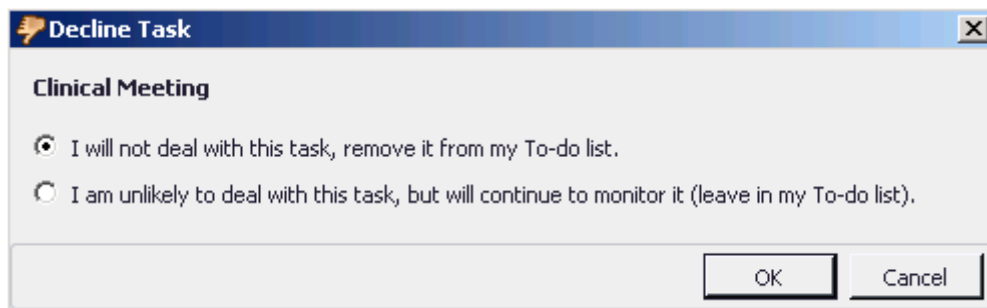
If you receive a task that you are unable to action, you can return it to the originator:

1. From the Daybook main screen, double click on the task required.
2. The task is displayed.
3. Return or reject the task as required using either:

-  **Reject** - Usually used for tasks allocated to one member of staff only. Select to return the task to sender unactioned.

-  **Decline** - Usually used for tasks allocated to more than one member of staff. 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.

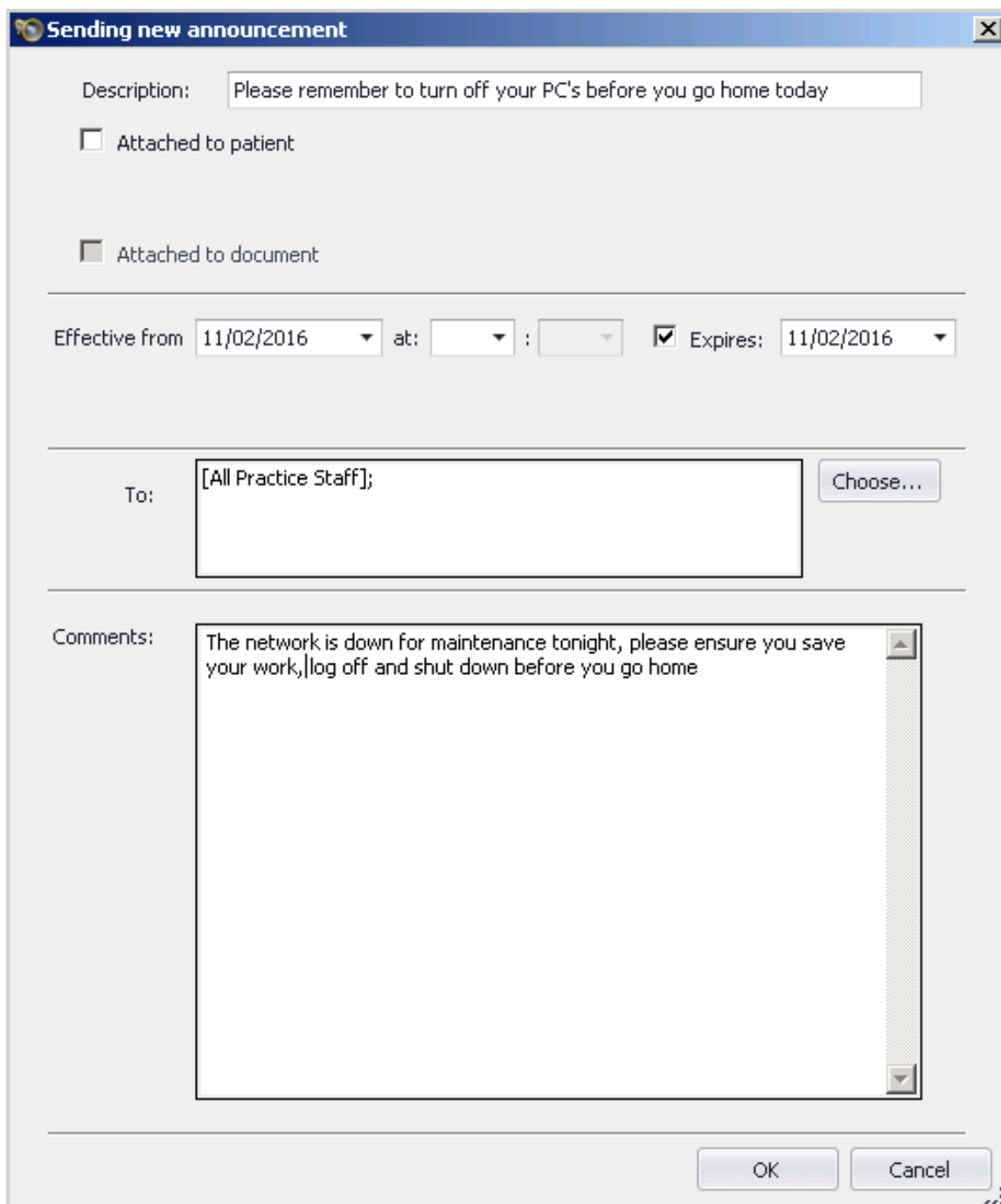


Creating an Announcement

An Announcement is a general message to other members of staff for information purposes only and therefore does not need actioning

To add a new Announcement, for either a member of staff or a staff group:

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



Sending new announcement

Description:

Attached to patient

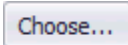
Attached to document


Effective from at: : Expires:

To:

Comments:

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 a date for the announcement using the calendar that displays.
- **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**  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.

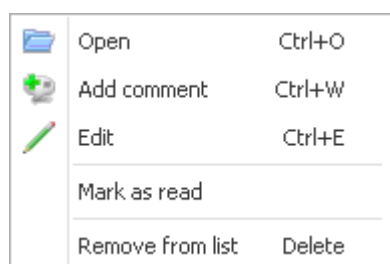
- **Comments** - Type any message for the announcement as required. If a specific patient has been selected you can use the **Insert** key to obtain a list of Read terms recorded in the patient's record. Choose the term required and select **OK**.


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

Removing an Announcement

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**.



 **Note** – You cannot reverse the removal.

Setting Your Out of Office

You can set an Out of Office to notify other members of staff that you are not available to receive a task:

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

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



2. Select **Out of Office** and select **Add**.

3. The **Out of office entry** screen is displayed:

A screenshot of a software dialog box titled 'Out-of-office entry...'. It contains several input fields and a checkbox. The 'First Date Out of Office' and 'Last Date Out of Office' fields both show '18 October 2018'. The 'Reason' field contains 'Annual Leave'. There is an unchecked checkbox for 'Open-ended'. Below these is a text area for 'During this time period, Tasks assigned to me are also assigned to:' which contains 'Carol Saturn;'. A 'Choose...' button is next to this text area. At the bottom are 'OK' and 'Cancel' buttons.

4. Complete as required:
 - **First Date Out of Office** - Select the first date of absence
 - **Last Date Out of Office** - Select the final date of absence or tick **Open-ended**
 - **Reason** - Add a description as required, eg Annual Leave
 - **During this time period, Tasks assigned to me are also assigned to** - Select a recipient to receive your tasks in your absence
5. Select **OK**.
6. Repeat step 3 if adding more than one period of absence.
7. Select **OK** to save and close.