Vision3

Daybook – Day to Day Use

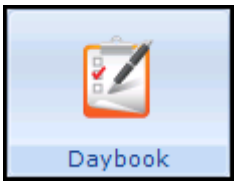
Daybook Hot Keys

The following shortcut keys can be used to speed up the creation and processing of **Daybook** tasks:

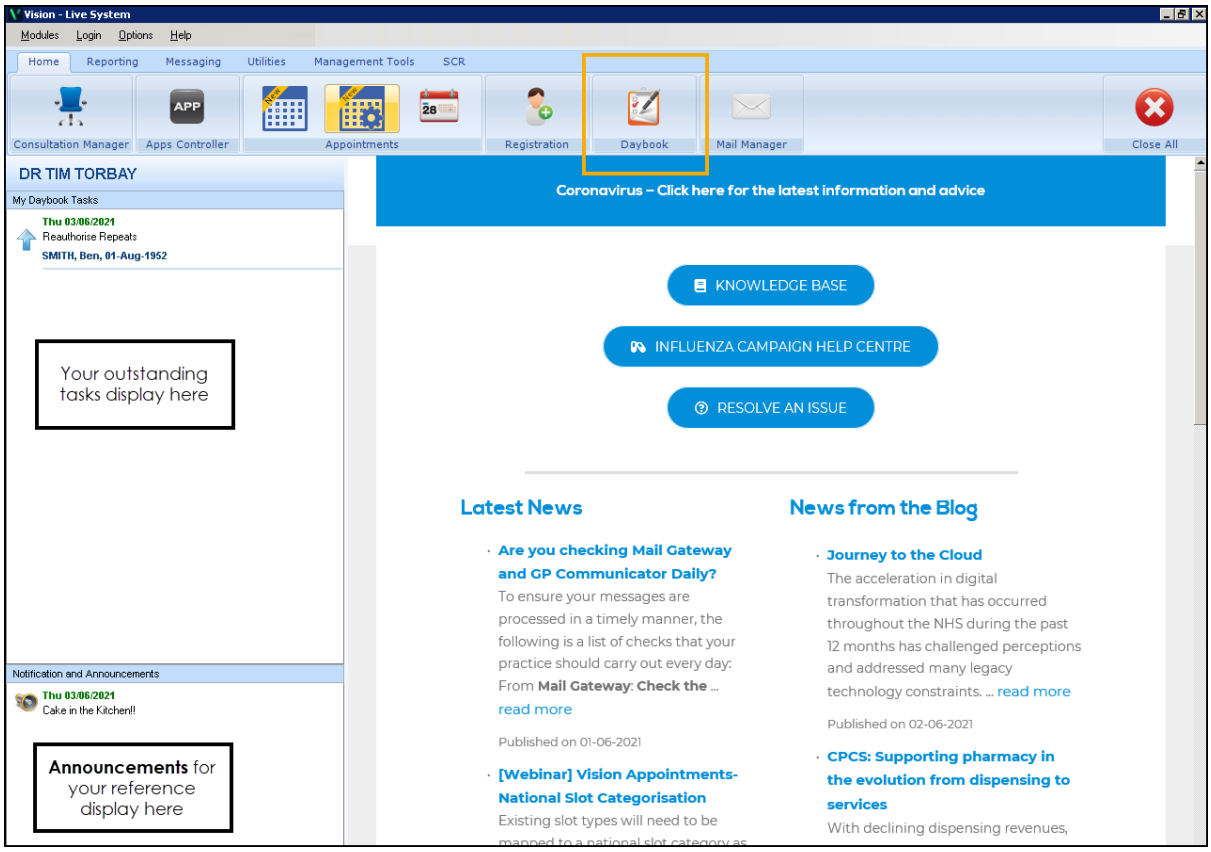
Key(s)	Action
F1	On-screen Help
F2	New Task
Ctrl+F2	New self-assigned task
Ctrl+F3	New Announcement
F4	Accept select task
F5	Declines selected task
F6	Returns selected task to sender
F7	Starts completion of select task
F8	Triggers new appointment for selected patient
F9	Triggers new Medical History entry for selected patient

Accessing Daybook

To access **Daybook**:

- From the **Vision 3** front screen select **Home – Daybook** 

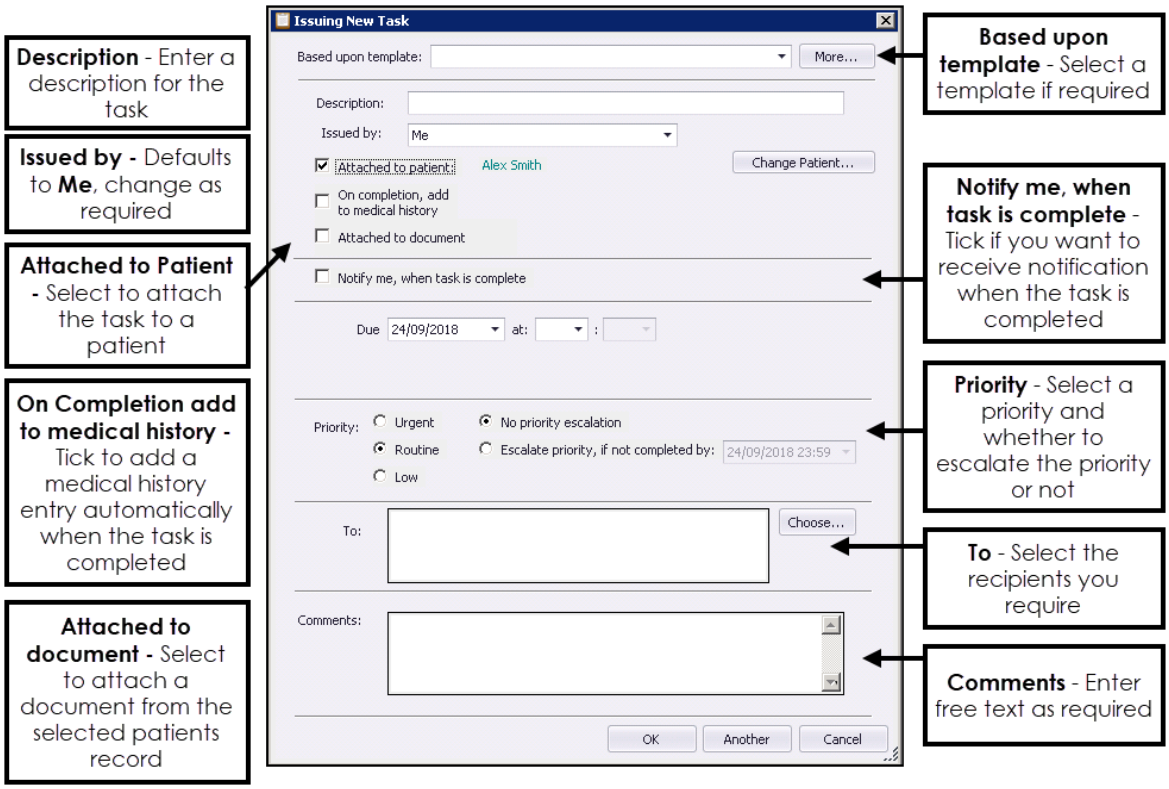
or use the **My Daybook Tasks** pane on the **Vision 3** front screen to access your allocated **Daybook** tasks, practice notifications and announcements:



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 displays:



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, for example, 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 patient's record displays 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:

  Due 24/03/2014 at: :

- **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.

    Escalate priority, if not completed by: 16/05/2014 14:00

- **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** [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.

- **Comments** - Type free text as required. If this task is linked to a patient, you can press the **Insert** key on your keyboard 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.

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

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

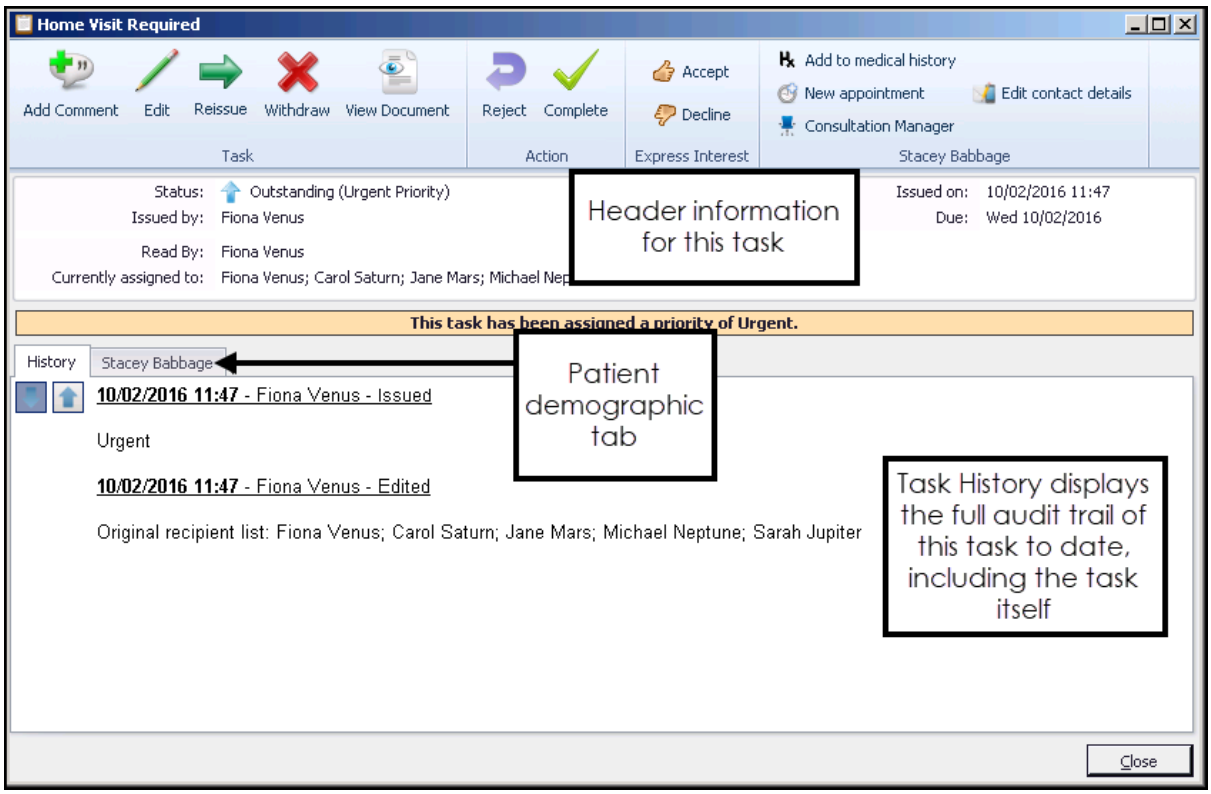
4. Select **OK** to save and send.

The task now displays in the **To-Do** list of the selected recipient(s).

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 displays:



Note - You can multi-select tasks for faster processing, simply hold the **Ctrl** key and highlight all the tasks required. This can be used for marking tasks as **Read/Unread**, **Complete**, **Withdrawn**, **Accpted/Declined**, **Categorised** or the same **Comment** added to all selected.

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 a Structured Data Area (SDA) displays. 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 displays, select **Yes** to mark it as complete without adding a clinical entry, or **No** to leave it outstanding.

- If no Read code has been assigned, Completing task displays. 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 displays, select either:
  - **I shall deal with this task, assign it exclusively to me** - To remove it from everyone else's To-Do tab, or
  - **Do not change assignment, but indicate to others I am working on the task** - To leave 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 displays, select either:
  - **I will not deal with this task, remove it from my To-Do list** - To remove the item from your To-Do list, or
  - **I am unlikely to deal with this task but will continue to monitor it (leave it in my To-do list)** - To leave 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 **Date** and then highlight the appointment you want to book. Select **OK**. A **Confirm Appointment** screen displays, **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 **Close**  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** 

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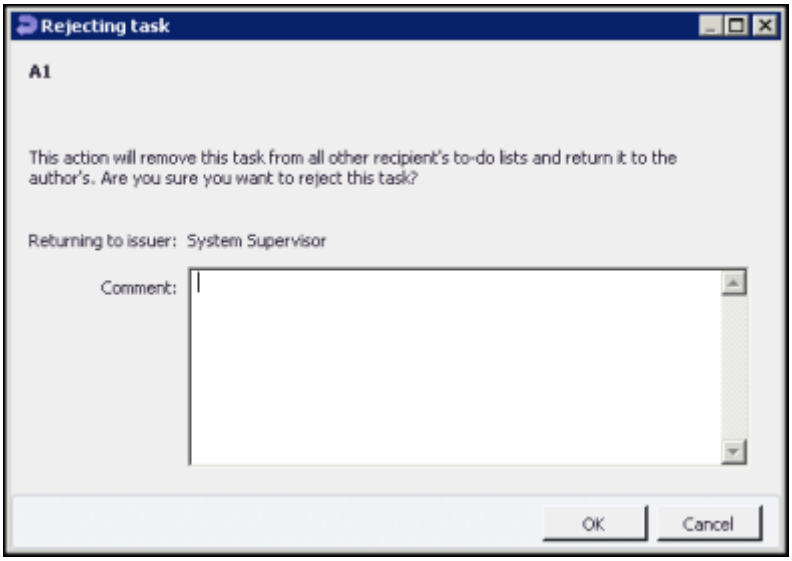
2. The **Rejecting task** screen displays, enter a reason into **Comments**:



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

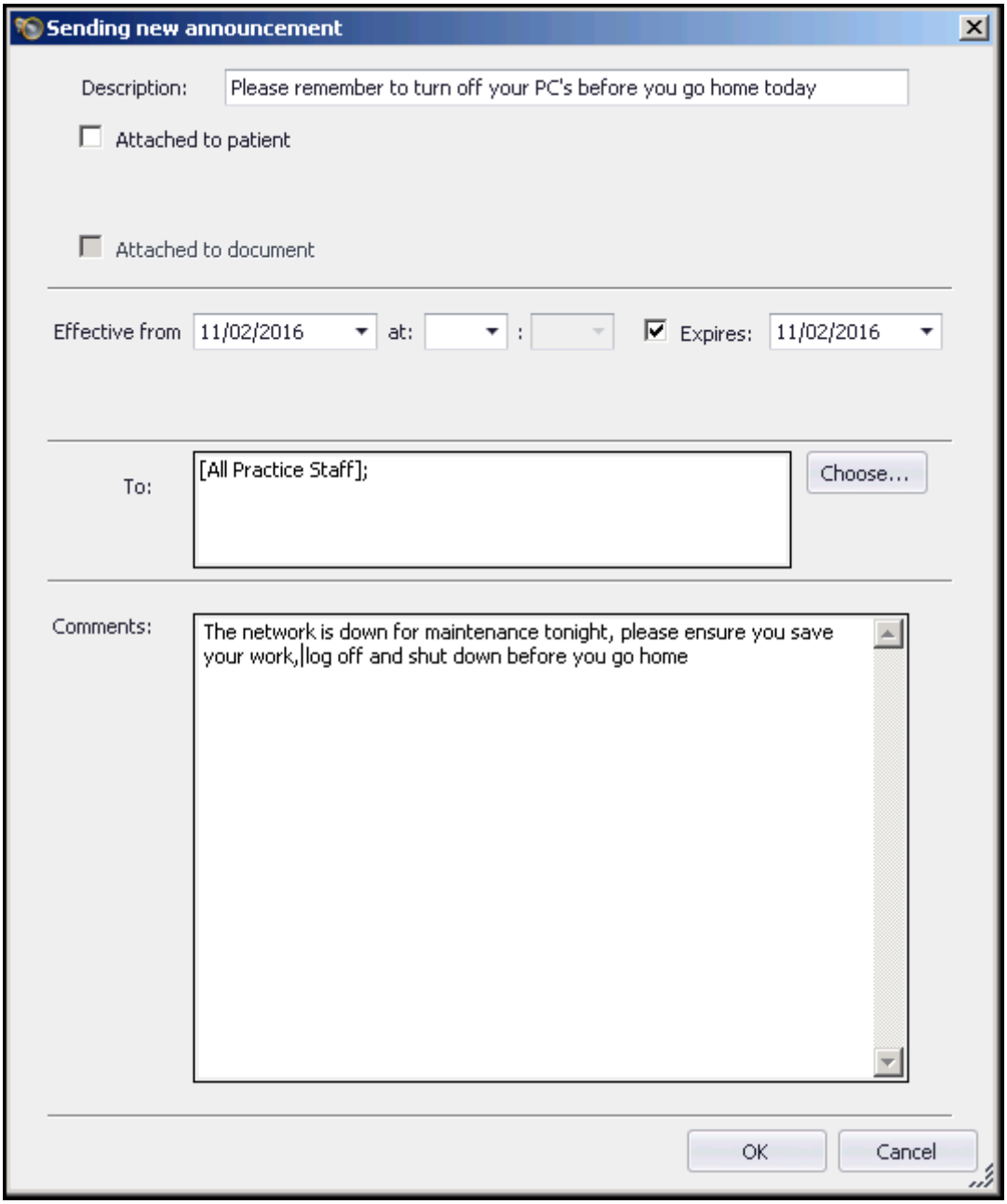
The task is now returned to its originator.

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, for example, 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**  . The **Sending new announcement** screen displays:



2. 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 select **OK**.
3. 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**.

If you are the originator of an **Announcement**, you have the additional options from the right mouse 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.

Setting up an Out of Office

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

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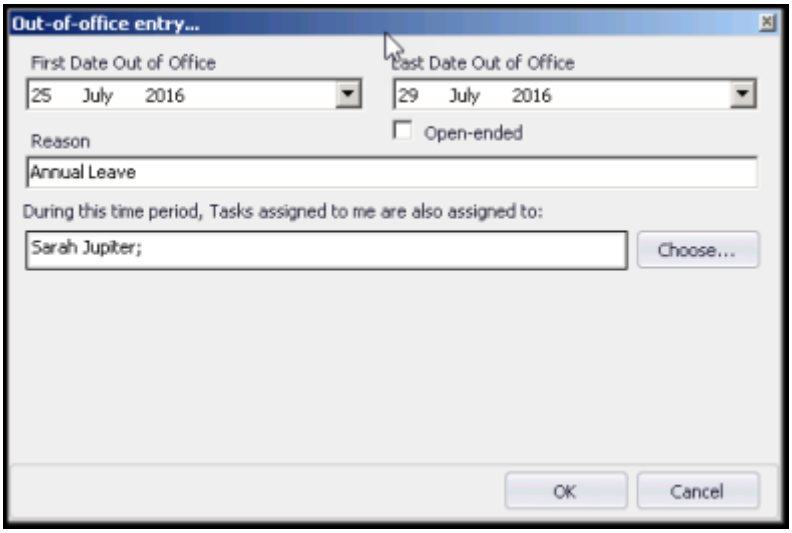
2. Select **Add**.
3. Select the first date of absence in **First Date Out of Office** and then either select a date in **Last Date Out of Office** or tick in **Open-ended**.
4. Add a description in **Reason** as appropriate, for example, Annual Leave.
5. If required, select **Choose** to select a member 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 **Select staff members** list with **(Out of office)**.