Safety Netting in Vision

Safety netting is a management strategy used in patient care to ensure patients are monitored until their signs and symptoms are explained or resolved. In a situation where normal referral and treatment plans cannot be adhered to, for example, the Coronavirus pandemic, Vision has a task management system included that enables you to monitor any disrupted events.

To use the Vision integrated task management system, whether you have Daybook or the new Vision Tasks app, you should create a group of staff to manage these tasks.

To create a Safety Netting staff group:

1. From the Vision front screen, select Management Tools – Control Panel.
2. From File Maintenance - Staff Groups – Practice, right click on Mail Groups and select Add Group.
3. The Staff Group – Add screen displays:

   ![Staff Group - Add](image)

4. Enter an appropriate name in Staff Group Desc, for example, Safety Netting Staff.
5. Select OK.
6. Right click on the new group and select Add Staff Member(s).
7. Select Staff Member – Add displays, while holding the <Ctrl> key, highlight all members of staff to add to the group.
8. Select OK.
Using Daybook for Safety Netting

To monitor any issues that are likely to be delayed, or for issues that a patient has decided to delay:

Create the Task

1. From Daybook, select Task.
2. The Issuing New Task screen displays, complete as appropriate:
   - **Description** – Enter a description as appropriate, for example, Deferred Referral
   - **Attach to patient** – Select the appropriate patient
   - **Notify me, when task is complete** – Tick if you want to be notified
   - **Due** – Enter a follow up date
   - **To** – Select the safety net group
   - **Comments** – Enter any comments you feel will help the safety net group manage this task
   - **On completion – Add to medical history** – You could add the following codes:
     - 9N6m.00 Reason for Referral delay – with the detail in comments, or
     - 8I14.00 Provis of advice assess treatment limit due to COVID19 pandem – with the detail in comments
3. Select OK to send.
Training Tip - You may want to set up a Task Template for this purpose, see Adding a New Task Template for details.

Monitor the Task
Logged in as a member of the safety net group:

1. From Daybook - To-do, enter the safety net group name in Filter:

2. All outstanding tasks allocated to the group display. Double click on the task required.

3. Select as appropriate:
   - **Add Comment** – Enter any action made, for example, *Phoned patient to remind*, or *Chased ENT re referral*
   - **Edit** – To change task details, for example, to update the **Due date**
   - **Reject** – To return the task to sender
   - **Complete** – To record this task as completed

**Note** – You need to review Comments on a Daybook task to see any additional comments.
Using Vision Tasks for Safety Netting

To monitor any issues that are likely to be delayed, or for issues that a patient has decided to delay:

Create the Task

1. From Vision Tasks, select **New task**.

2. The **New Task** screen displays, complete as appropriate:
   - **Recipients** – Select the safety net group
   - **Subject** – Enter a short description for the task, for example, Deferred Referral
   - **Description** - Enter any comments you feel will help the safety net group manage this task
   - **Attach patient** – Select the appropriate patient
   - **Category** – Select **Follow up**
   - **Due Date**– Enter a follow up date

3. Select **OK** to send.

**Training Tip** - You may want to set up a Task Template for this purpose, see **Setting up Task Template** for details.
As you are unable to add appropriate clinical terms directly from **Tasks**, you should consider adding one of the following clinical terms to the patient record:

- **9N6m.00 Reason for Referral delay** – with the detail in comments, or
- **8I14.00 Provis of advice assess treatment limit due to COVID19 pandem** – with the detail in comments

**Remember** – You can access the patient record directly from Tasks, see [Vision Tasks Help Centre](#) for details.

**Monitor the Task**

As the originator of a task within Vision Tasks, you are automatically notified of any additions to the **Conversation** and **Activity** added to it. If you are not the originator, but are logged in as a member of the safety net group:

1. From **Vision Tasks**, filter the **My tasks** screen by the **Follow up** Category:

2. Enter the safety netting group name in **Search**

3. **Highlight the task required.**

   **Select as appropriate:**

   - **Conversation** – Enter any messages for either the originator or other recipients of this task
   - **Activity** – Enter any details of action taken
   - **Options** - **Reject** – To return the task to sender
   - **Options** - **Complete** – To record this task as completed

**Remember** – You can access the patient record directly from Tasks, see [Vision Tasks Help Centre](#) for details.