



## Getting Ready for Tasks - Migrating from Daybook

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# Table of Contents

<b>Getting Ready for Tasks - Migrating from Daybook .....</b>	<b>1</b>
<b>Getting ready for Tasks - Daybook Users .....</b>	<b>4</b>
Introduction.....	4
<b>What do I need to do? .....</b>	<b>5</b>
<b>Training.....</b>	<b>6</b>
eLearning .....	6
Tasks Help Centre .....	6
<b>Managing Security Rights.....</b>	<b>7</b>
<b>Managing Staff Email Addresses .....</b>	<b>9</b>
To check an email address.....	9
To add an email address .....	10
To update an existing email address .....	11
<b>Managing Staff Groups .....</b>	<b>12</b>
Adding a new staff group.....	13
To add or remove staff to a group .....	13
<b>Reviewing Task Templates in Daybook.....</b>	<b>14</b>
Administrative Codes .....	15
<b>Managing Existing Announcements .....</b>	<b>16</b>
<b>When Migration is Complete.....</b>	<b>17</b>

## Getting ready for Tasks - Daybook Users

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### **Introduction**

Our new Tasks app provides an easy to use task management system for your practice. The first release of Tasks is specifically designed to help create, keep track of and process tasks and to-do lists quickly and easily.

We are proud of Tasks and are currently working to bring you even more new features. Future releases will bring all of your clinical messages into Tasks, providing a single app to manage all the tasks your practice needs to process on a day by day basis.

## What do I need to do?

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The following should be considered **before** you migrate to Tasks:

- **It is vital you review all your outstanding tasks in Daybook** - Complete as many of your outstanding tasks as possible, especially your system generated ones, to ensure only those tasks that require actioning are migrated.
- **Training** - Complete the [eLearning](#) and/or use this help centre to find out all you need to know about migrating to and using the Tasks app.
- **Check security rights** - By default all staff have access to Tasks, however, only staff with system manager rights in Vision 3 can:
  - Create and maintain templates.
  - View **All tasks** including sensitive tasks.
  - Allocate tasks received from other organisations.

See [Security - Add User to Security Group](#) for instructions on how to manage Vision 3 security rights.

- **Set up Set up Role Based Access Cards (RBAC) (England only)** - If you were already using Daybook, you should already have the required RBAC activity **B0093 Create Work Item** on your Smartcard. You need to ensure all staff that may need to use Tasks have this activity on their Smartcards, please contact the relevant person at your Registration Authority (RA) who can help with this.
- **Review staff email addresses** - Review, and where necessary add, valid email addresses for your staff in Vision 3 to enable them to log in to Tasks. See [Managing Staff Email Addresses](#) on page 9 for details.
- **Review existing Staff Groups** - Review, update and, where necessary, create Staff Groups to enable the most effective allocation of Tasks and the set-up of Template quick lists. See [Managing Staff Groups](#) on page 12 for details.
- **Review Task Templates** - Any task templates you have created in Daybook are migrated into Tasks. You can review, update, delete and if necessary add to your task templates before you migrate to Tasks to ensure the templates migrated are accurate and appropriate. [Click here for instructions on how to manage your Task templates in Daybook.](#)
- **Review outstanding Announcements** - As announcements are not migrated to Tasks, any future announcements set up in Daybook need to be noted and then added to Tasks once migration has taken place.

## Training

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We are providing the following resources to ensure you can get the best out of our new Tasks app.

### eLearning

While Tasks is intuitive and easy to use, for you to get the most out of the experience, we recommend that you spend a little time going through the Tasks eLearning modules. This short interactive course walks you through the different screens and how to undertake your day to day tasks. You'll even get a certificate at the end!

Benefits of eLearning include:

- Free training saving your practice £££s
- You can learn at your own pace
- Training can be taken anytime and anywhere - even at home!
- Less disruption - no travelling, significantly less time taken from important practice work

[Click here to register for the free Tasks eLearning. We will send you a link within 24 hours and you will be an expert within half an hour.](#)

[If you already have an eLearning account click here to access the Vision eLearning Hub](#)

### Tasks Help Centre

We have also created a full Tasks Help Centre to assist you in utilising Task in the best way for your practice and staff. This contains short video tutorials, a frequently asked questions section, a quick and powerful search facility as well as quick start screens. The Tasks Help Centre is available from [http://help.visionhealth.co.uk/tasks\\_help\\_centre/1.4/Content/Home.htm](http://help.visionhealth.co.uk/tasks_help_centre/1.4/Content/Home.htm).

## Managing Security Rights

There are certain aspects of Tasks that can only be carried out by system managers for example, creating Templates.

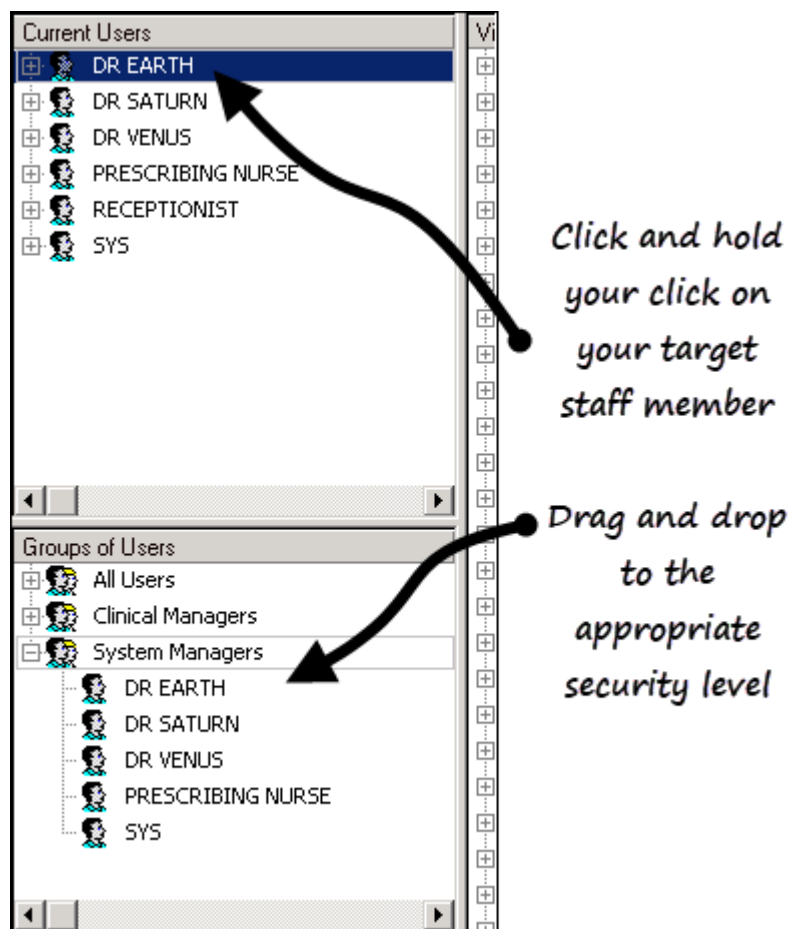
To add a user to a security group:

1. From the Vision 3 front screen, select **Management Tools - Control Panel**



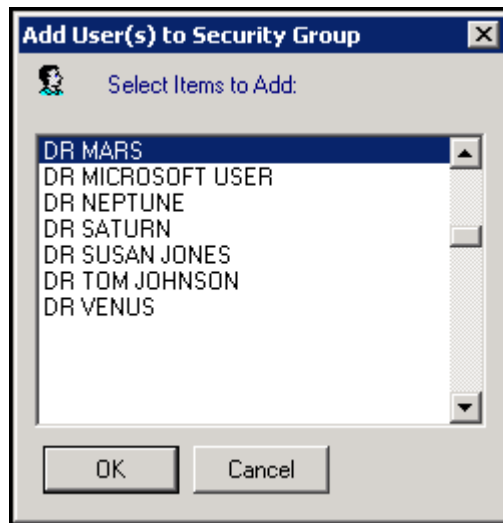
- **Security.**

2. Next either:
  - Select the user in the **Current Users** list and holding the left mouse down, drag them to the bottom left pane and drop them in the group you want.



Or

- Highlight one of the group headings in the bottom left pane, for example **Clinical Managers**, or **System Managers**, right click and select **Add User(s) to Group**. Highlight the staff member to be added to the Group and select **OK**.



For full information about Staff Groups in Vision 3, please see Vision on-screen Help.



## Managing Staff Email Addresses

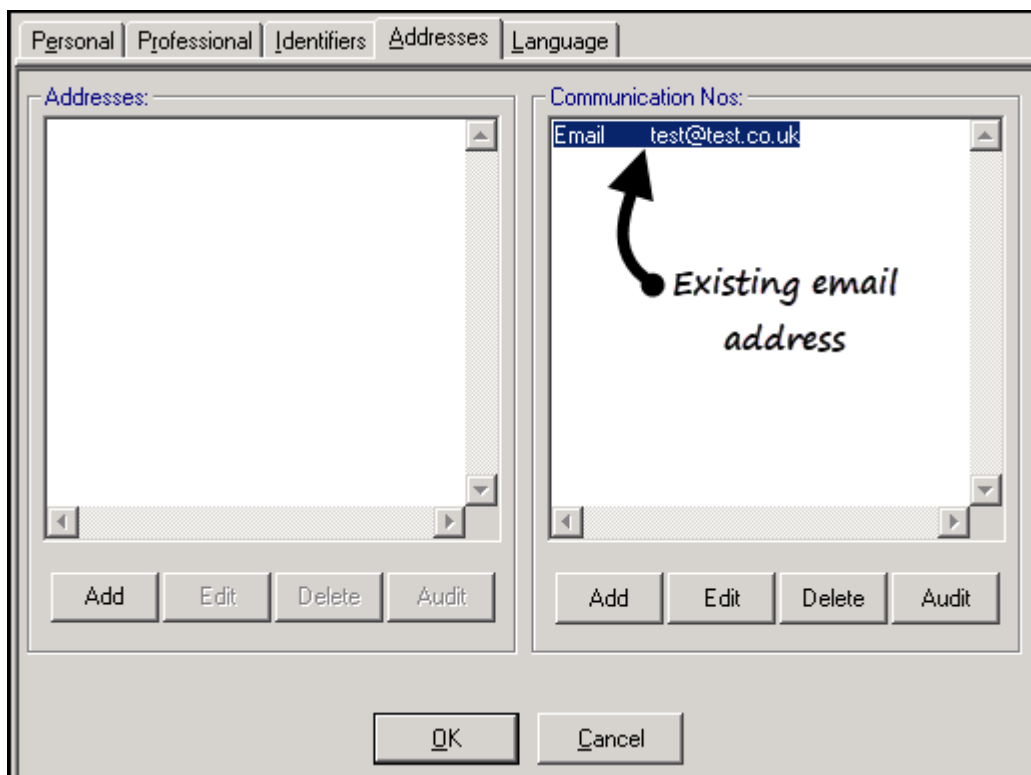
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The recording of main address details for your staff is optional, however a valid email address must be recorded in order for your staff to access **Tasks**.

### To check an email address



1. From **Control Panel**, select **File Maintenance - Staff**.
2. Select the member of staff required and select **Edit**.
3. Select the **Addresses** tab, any recorded email addresses display in the **Communication Nos** pane.



## To add an email address



1. From **Control Panel**, select **File Maintenance - Staff**.



2. Select the member of staff required and select **Edit**.
3. Select the **Addresses** tab.
4. From the **Communication Nos** section, select **Add** and the **Communication - Add** screen displays:



**Communication - Add**

Contact :  
test@test.com

Type of Contact :  
Email

Verified

Valid Period

From :      Until :  
[ ]      [ ]

OK  
Cancel  
Help

5. Complete as follows:
  - **Contact** - Enter the email address required.
  - **Type of Contact** - Select **Email**.
6. Now select **OK** to save and close.

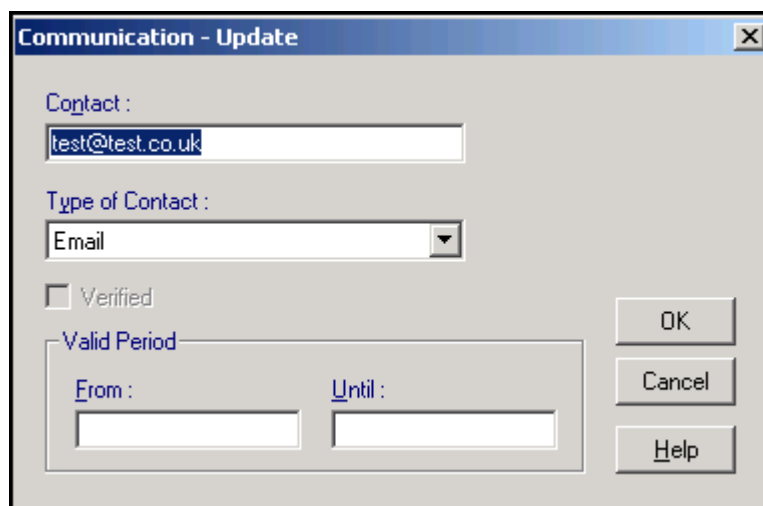
## To update an existing email address



1. From **Control Panel**, select **File Maintenance - Staff**.



2. Select the member of staff required and select **Edit**.
3. Select the **Addresses** tab.
4. From the **Communication Nos** section, highlight the email to update and select **Edit**.
5. The **Communication - Update** screen displays:



6. Update the email address as required.
7. Finally, select **OK** to save and close.

## Managing Staff Groups

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Staff Groups are practice defined groups of staff that are selected from various Vision modules, for instance, a group of Receptionists, GPs, or Health Visitors.

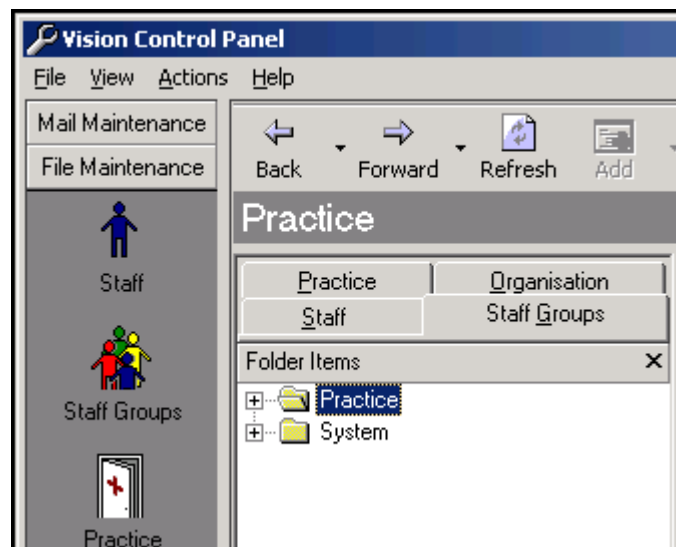
Staff groups are set up and maintained from **Vision 3 - Control Panel**



**- File Maintenance - Staff Groups.**

On selection of the **Staff Groups** tab, two folders display:

- **Practice** – Allows you to create your own defined staff groups, for example Reception Staff, GPs, Admin.
- **System** - **System groups** are used for allocating **Frequent** staff in **Mail Manager** but are not used in **Tasks**.



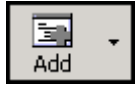
To display all the members of a group:

1. Select **+** beside the **Practice** folder to display existing groups.
2. Select **+** beside either **Mail Groups** or **Frequent Staff**.
3. Now select a group to display all the members of that group.

## Adding a new staff group

You may decide to create groups specifically for the management of task templates. This can help ensure that the most commonly used task templates are offered to your staff in the most appropriate way. For example, you could set up **Tasks - GPs, Tasks - Reception, Tasks - Administrators** etc.

1. From **Vision 3 - Control Panel - File Maintenance - Staff Groups**, simply



select the down arrow on **Add**.

2. Select **Add Group** and complete **Staff Group - Add** as appropriate.

## To add or remove staff to a group

1. From **Vision 3 - Control Panel - File Maintenance - Staff Groups**, select a group name in the left hand pane and the top right pane shows all the active staff in the selected group.
2. The bottom right pane contains a list of **All Staff**, simply drag and drop staff to either add to (drag from bottom to top) or remove from (drag from top to bottom) a group.

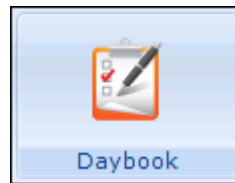
## Reviewing Task Templates in Daybook

All of your active Task Templates are migrated from Daybook to Tasks as part of the migration process. You should therefore take the time to review and tidy your current templates.

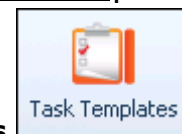
**Please be aware** - Only a subset of coded Medical History entries can be triggered from a task, see [Administrative Codes](#) on page 15 for the list. If any of your templates have codes other than those on the list, these codes are removed on migration.

To review your templates:

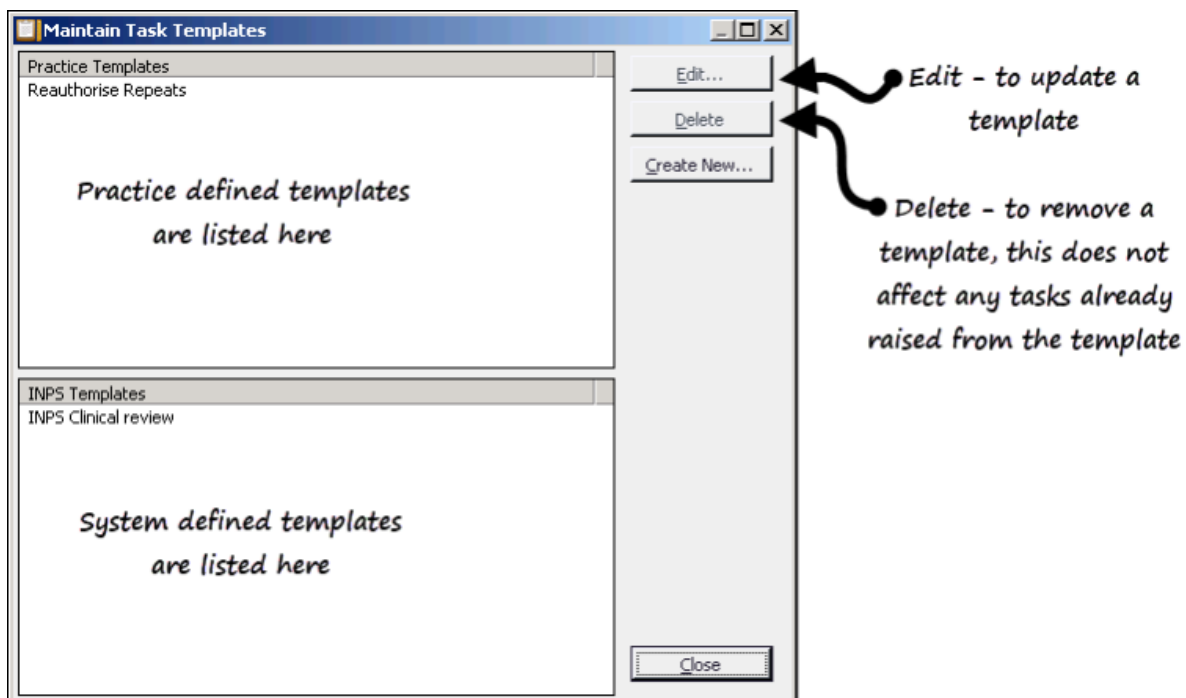
1. From the Vision front screen, select **Daybook**



2. Select the **Maintenance** tab and then **Task Templates**



3. The **Maintain Task Templates** screen displays:



4. Highlight the task you wish to review and select **Edit**:
  - **Practice Templates** are those created by your practice, these can be updated or removed as you require. Tasks already created from these templates are not affected by your actions.
  - **INPS Templates** are those created by Vision, only certain areas can be updated and they cannot be deleted.
5. Update any details should you require and select **OK**.

## Administrative Codes

The following codes can be attached to a Task and are recorded back to Vision once the Task is complete:

- 9....00 Administration
- 8B3H.00 Medication Requested
- 9N31.00 Telephone Encounter
- 67I..00 Advice
- 9p...00 Medication Monitoring Administration
- 8H...00 Referral For Further Care
- 9N7..12 Patient Asked To Come In
- 8B2F.00 Prescription by GP
- 9N7C.00 Patient asked to make an appointment
- 8B31100 Medication Given
- 9N2Y.00 Seen By Community Paediatric Nurse
- ZL63200 Referral To District Nurse
- 9N1C.11 Home Visit
- 9Nc..00 Referral Letter Status
- 9NE1.00 Dictated On Tape:Letter To
- 414..00 Sample Sent To Lab. For Test
- 9N38.00 Message From Patient
- 8B3y.00 Medication Review Of Medical Notes
- 41C..00 Patient Informed - Test Result
- 9D1..00 Med3 - Doctor's Statement
- ZQ3J.00 Triage
- 9N37.00 Message Given To Patient
- 413..00 Laboratory test requested

## Managing Existing Announcements

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Announcements raised in Daybook are not migrated to Tasks.

There is no way within Daybook to view all outstanding Announcements, as they can be raised by any Daybook user for the information of any or all other Daybook users. Therefore, the most effective way to manage this aspect of the Daybook to Tasks transition is to ask all your staff to make a note of their own outstanding Announcements, both raised and received.

These can then be manually entered into Tasks once the migration has taken place.



## When Migration is Complete

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Once you have migrated to Tasks, the **Daybook** button on the front Vision screen is updated to a **Tasks** button and the Tasks pane on your Vision 3 front screen is replaced by an expanded Helpline Blog pane.



You should now check your Task Templates and set the order they display in for each staff group, see [Editing or Deleting Task Templates](#) and [Setting the Display Order of Task Templates](#) for details.