

# Vision Daybook

Clinical and Administrative Task Management



### Table of Editions and Contents

Date	Version	Contents	Output
	001	Initial draft (hdoo)	Docx
	002	Interim Review (estu)	Docx
15/08/11	003	Interim Review (smur)	PDF
24/08/11	004	Updated with software changes	PDF
12/09/11	005	Updated with software and install changes	PDF
13/09/11	006	Review (estu)	PDF
14/09/11	007	Startup added	PDF
19/09/11	008	Tasks within Appointments added	PDF
28/09/11	009	Review (lhol, mtay, rraj and doke)	PDF
8/11/11	010	Postgres blocked error messages added	PDF
8/11/11	011	Postgres removed from Pre-requisites	PDF
14/11/11	012	Removed Troubleshooting Link	PDF
16/01/12	013	Correction to spelling error pg 44	Docx & PDF
30/01/12	014	Notes added to: Adding a New Task Template re default priority, Adding a New Announcement re To and Cannot edit. Managing Announcements section added. Tab specific added to Searches button	Docx & PDF
10/04/12	015	Removed reference to Training Podcast	Docx & PDF

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# Vision Daybook

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## Introduction

Vision Daybook is a new Vision module which allows you to create, track and complete clinical and administrative tasks within your practice. All patient tasks are additionally displayed on the Reminder within Consultation Manager and Appointments.

Examples of common clinical and administrative tasks include:

- GP to ring patient regarding test results.
- GP to amend patient's medication and re-authorise prescription.
- Nurse to order supplies.
- Reception to make an appointment for a patient.
- Reception staff meeting at 12.30 in the boardroom.

## Pre-requisites

**DLM 380** – You must have DLM 380 or above to access Vision Daybook.

**LAN Practices** – You must ensure that **.NET Framework 3.5 SP1** is installed on each workstation required to use Daybook. This was delivered as part of **DLM 313** (You can see the version of .Net you have installed from the front screen of **Vision – Options – Install .Net**. For installation instructions see [http://www.inps4.co.uk/my\\_vision/vua/dlm/index.html](http://www.inps4.co.uk/my_vision/vua/dlm/index.html)).

**VES Practices** – You already have the latest **.NET** files installed, therefore no action is needed.

**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:

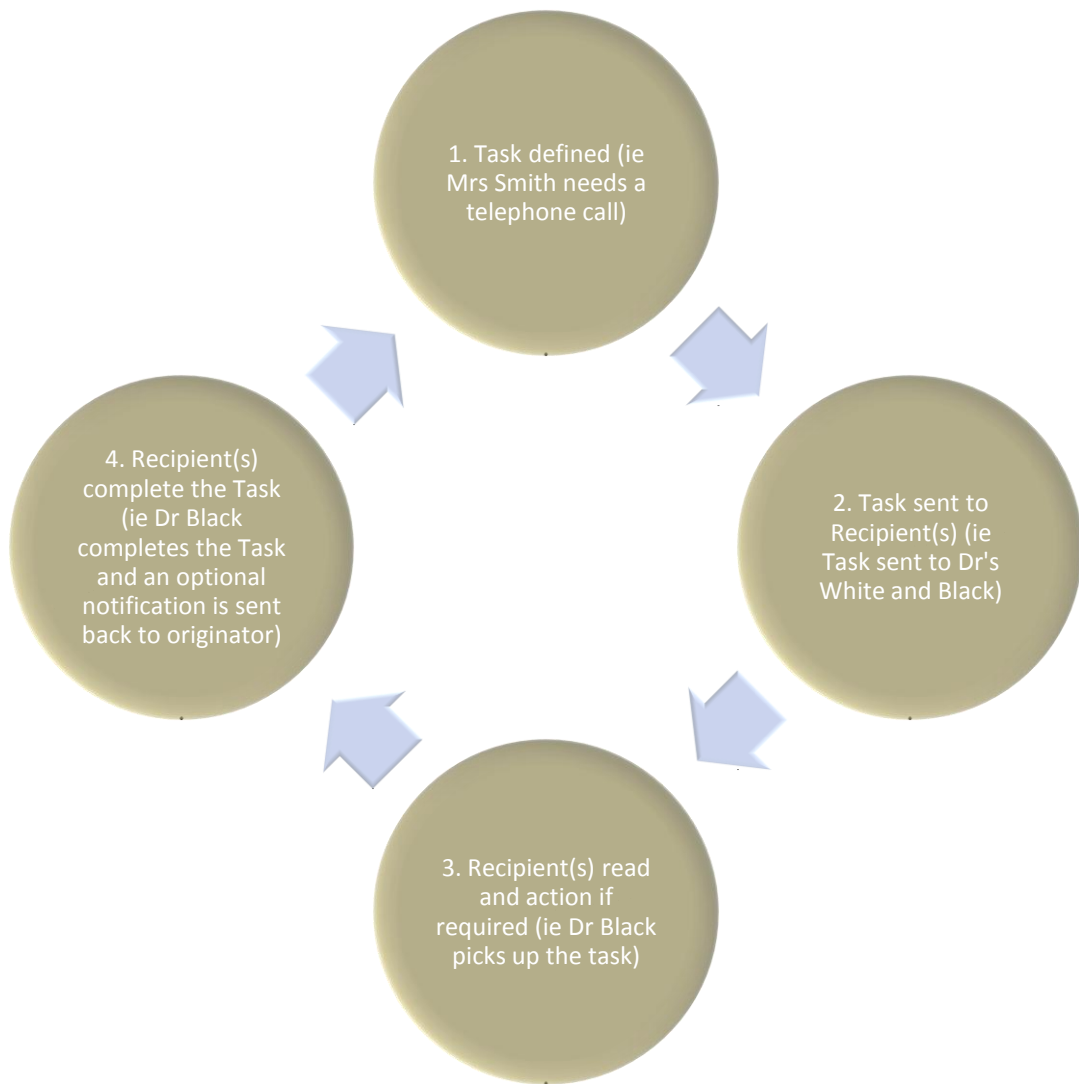
- **B0093** Create Work Item

## What You Need To Do:

- **Staff Groups** – Create appropriate staff groups so that you can allocate Tasks more effectively. See Control Panel on-screen help.
- **Tidy Reminders** Tidy the reminders that display in Consultation Manager, 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 “Pre-requisites” on page 1.
- **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” on page 35.
- **Register for a practice Webinar** – Register for a practice webinar to get the most out of Vision Daybook. For details see <http://www.inps4.co.uk/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:



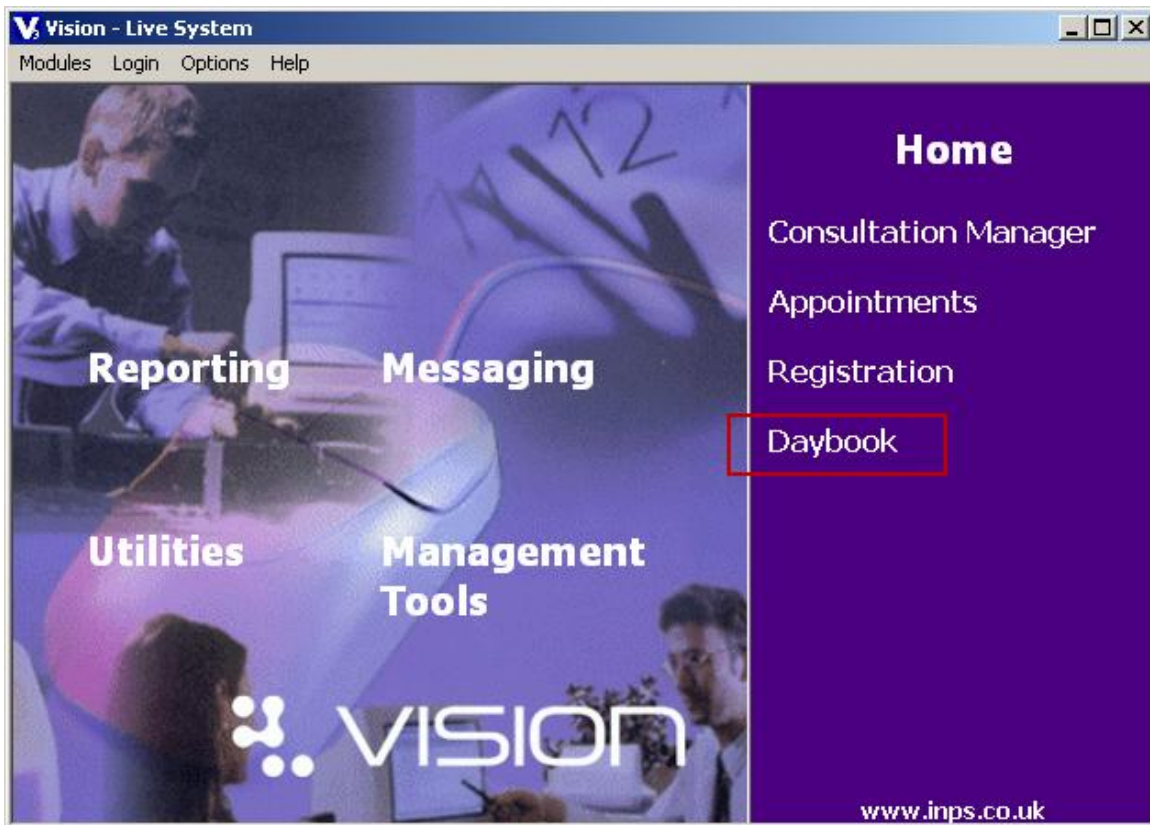
*Task workflow diagram*

## Accessing Vision Daybook

Before you access Daybook, please ensure the pre-requisites have been met; see "Pre-requisites" on page 1 for details.

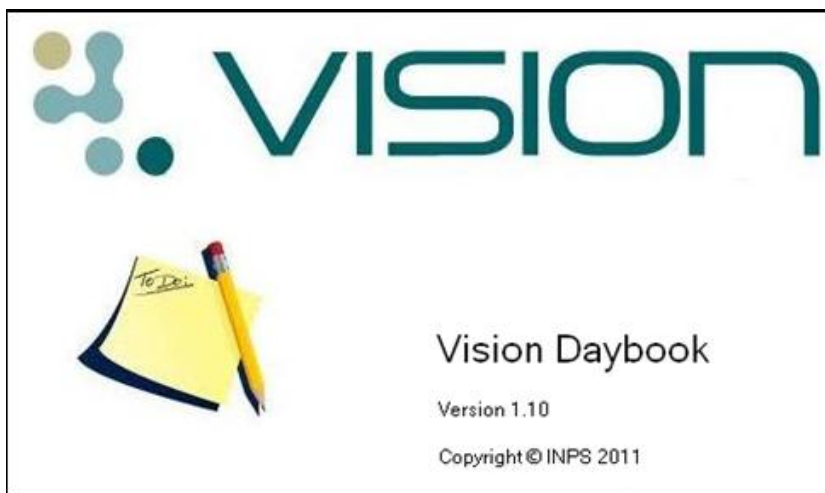
To access Vision Daybook:

1. From Vision Home menu, select **Daybook**.



*Vision Front Screen - Home- Daybook*

2. The Daybook loading screen is briefly displayed.



*Daybook loading screen*

3. Daybook is displayed.

The screenshot shows the Vision Daybook - System Supervisor application. The main window displays a task list with columns for Due Date, Task, Patient, Assigned To, Assigned By, and Assigned On. The tasks are categorized into 'Next 7 days' and 'Today: Tuesday 23/08/2011'. A 'Reading Pane' on the right shows details for a selected task: 'Please Reauthorise the following:: All Meds'. A 'Notifications and Announcements' section at the bottom shows a list of messages with effective dates and descriptions.

**To Do List** – Displays your outstanding tasks.

**My Sent Tasks** – Displays tasks you have sent

**My Actioned Tasks** – Displays your completed tasks.

**Tasks for Patient** – Displays tasks attached to a patient

**All Outstanding Tasks** – Displays all outstanding tasks except Self-assigned Tasks.

**Reading Pane** – This can be displayed to the Right or Bottom of the screen, or switched off
















**Notifications and Announcements** – These are for information only.

I	Effective Date	Description	Patient	Assigned To	Assigned By	Assigned On
✓	08/08/2011 13:01	Please Reauthorise th...	ALICE SMITH 10/10/...	System Supervisor;	Jane Mars	08/08/2011 13:01
✓	08/08/2011 09:54	Please Reauthorise th...	VIVIENNE DUNHILL ...	System Supervisor;	Jane Mars	08/08/2011 09:54

An example of Vision Daybook

## Vision Daybook Toolbar

The following buttons are available on the Vision Daybook toolbar:

-  **Add New Task** – To add a new Task, or using the down arrow, a new announcement or self-assigned task.
-  **Open Item** – To open a task.
-  **Edit Item** – To edit a task.
-  **Register Interest** – To claim a task sent to more than one person.
-  **Decline the Task** – To refuse a task sent to more than one person.
-  **Complete Task** – To complete a task.
-  **Return to Sender** – To refuse a task and return it to its originator.
-  **Make Appointment** – To view and book from available appointments.
-  **Record Medical History** – To record history to the patient record.
-  **Select Patient** – To select tasks for a specific patient.
-  **Refresh the List** – To manually update the task lists.
-  **Options** – To view and edit Vision Daybook options.
-  **Out of Office Manager** – To set up and edit Out of Office messages.
-  **Search for text or people** – To search any data within Vision 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.
-  **Launch Application** – To launch **Consultation Manager**, **Appointments** or **Mail Manager** modules.

## Creating Tasks

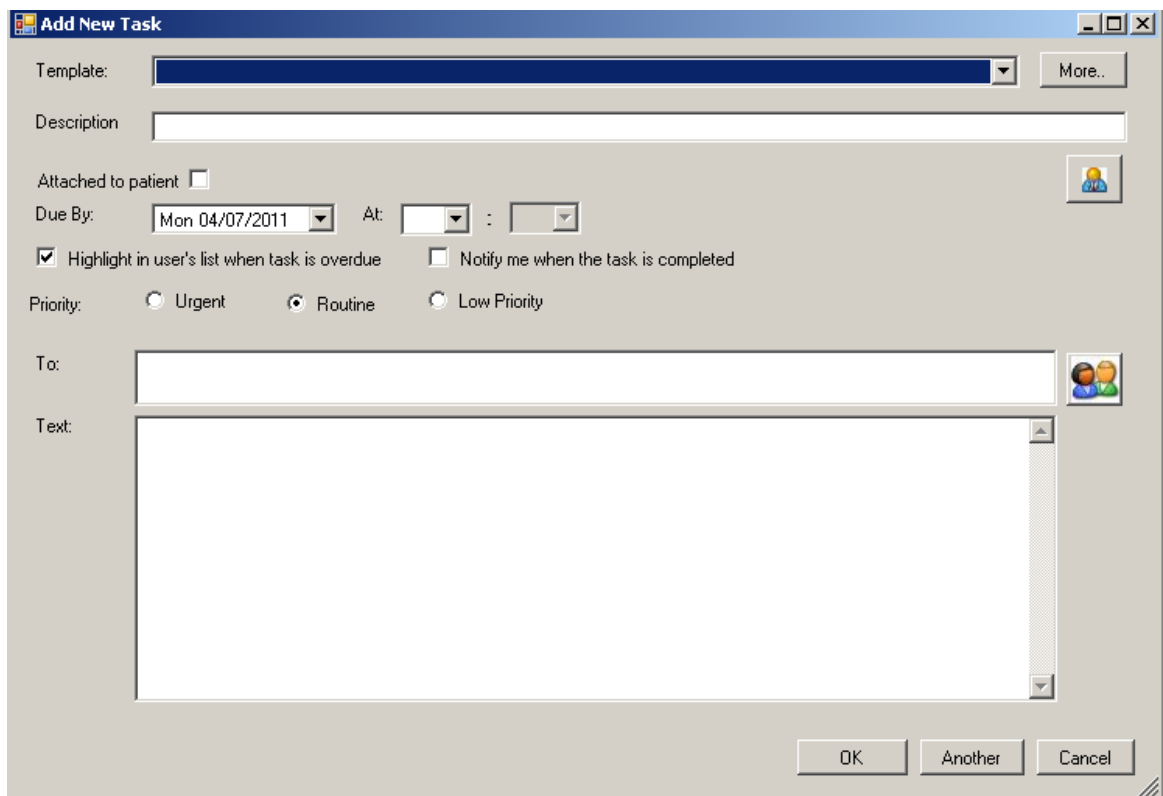
A task is a job or a piece of work that an individual or group is given to do. It is usually quite short in duration or has a deadline, and a response is sometimes required. There are three general categories of task:

- **Specific Action**, usually tasks that require further action. (See [Adding a Specific Action Task](#) on page 7).
- **Announcement**, usually no further action required. (See [Adding a New Announcement](#) on page 9).
- **Self-assigned**, usually a reminder to self. (See [Adding a New Self-assigned Task](#) on page 11).

### Adding a Specific Action Task

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

1. From **Daybook**, click  or select **Task – New**.



*Add New Task screen*


- **Template** – Allows you to select a predefined task from the **Frequent Task List**. For further details on adding templates refer to [Task Templates](#) on page 34.
- **More** – Allows you to select any predefined Task. For further details on adding templates refer to [Task Templates](#) on page 34.

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

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- **Description** – Enter a description for this task, ie Make appointment for patient.
- **Attached to patient** – Allows you to attach this task to a patient.

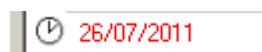
Select the patient by clicking on  and selecting the patient in the usual way.

- **Due By** - If there is a timeframe attached to this task, select a due date, and time if appropriate.

Due By:  At:  :


*Example Due By*

- **Highlight in user's list when task is overdue** - If you want the due date of this task to turn red and display a clock icon for the recipient when it is overdue, tick.




*Example of overdue task displaying the overdue clock and date in red*

- **Notify me when the task is completed** – Tick if you require notification that the task has been completed.
- **Priority** – Select a priority:

**Urgent** (  precedes the task within Daybook)


**Routine**

**Low Priority** (  precedes the task within Daybook).

- **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.

**OR**



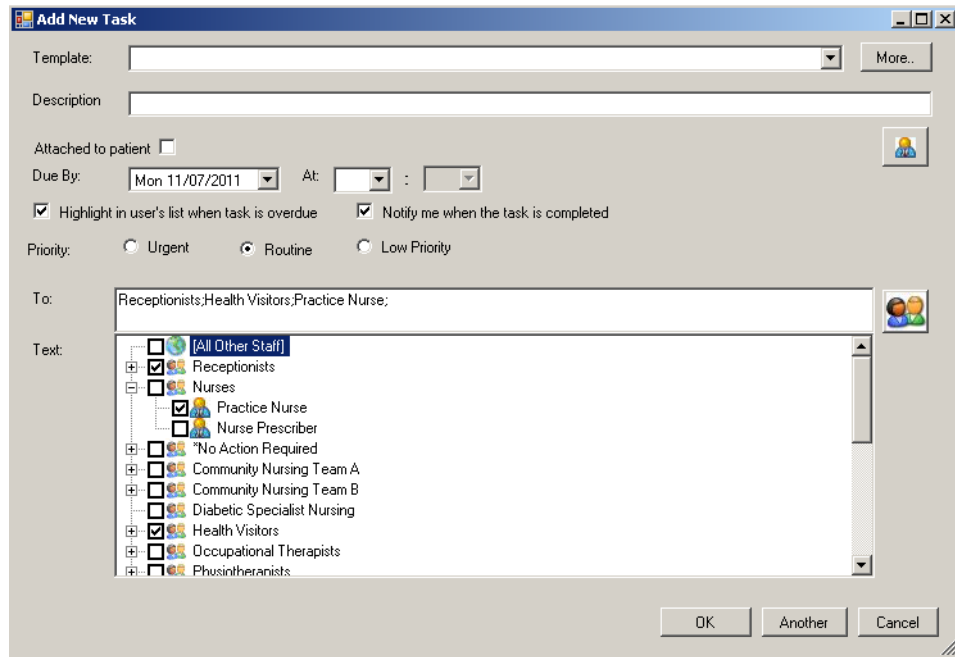
Click on  to view the hierarchical list of staff groups. Ticking any group or individual enters them into the **To** list, ticking again removes them.

Click into the **To** box to close and save the selection.

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**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.

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*Hierarchical multi-select list of staff groups*

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

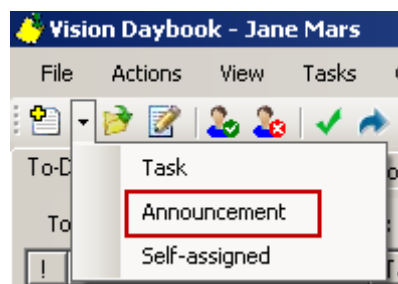
- **Text** – Type free text as required, click **OK** to save and return to the task.
- **Another** – Saves the current Task and presents a new **Add New Task** screen.
- **OK** to finish and send.

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

## Adding a New Announcement

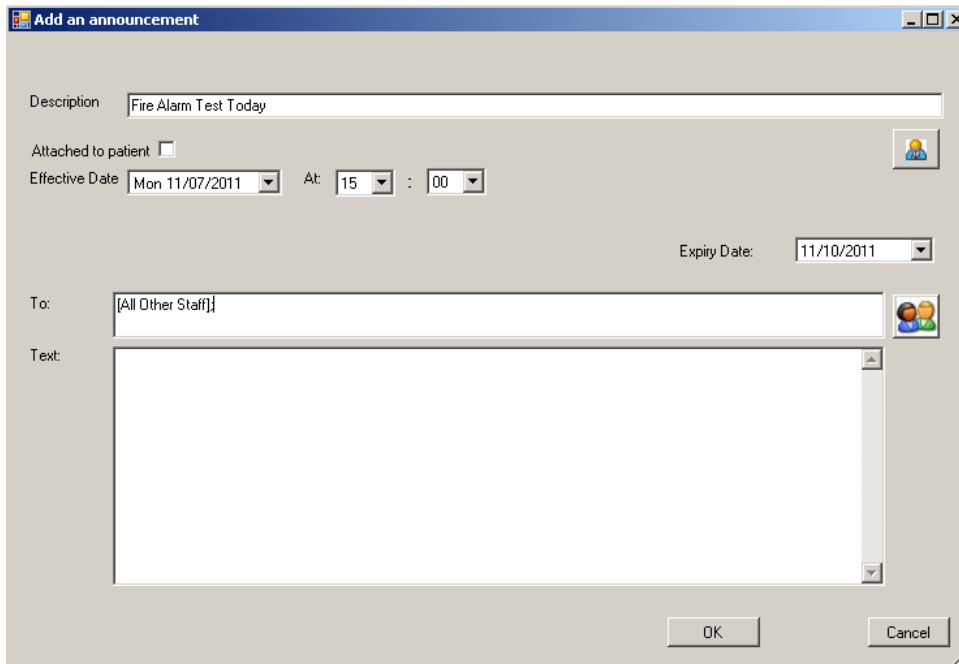
An Announcement is a general message to other members of staff for information purposes only. An Announcement does not need actioning ie Fire Alarm Test information. To add a new Announcement, for either a member of staff or a staff group within Daybook:

1. From **Daybook**, click on  and select **Announcement**, or click on **Task** and select **New Announcement**.



*Down arrow list – Announcement*

2. The **Add an announcement** screen is displayed.




*Add an announcement*

You have the following options:

- **Description** – Allows you 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** – Allows you, using the calendar that displays, to set a date for this announcement.
- **At** – Allows you to set a time for this announcement
- **Expiry Date** – Allows you to set a date for the announcement to expire and no longer display.
- **To** – Allows you 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**.  
**OR**



Click on  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**.

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

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- **Text** - 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. Click on the term required and click **OK**.

3. Click **OK** to finish and send.


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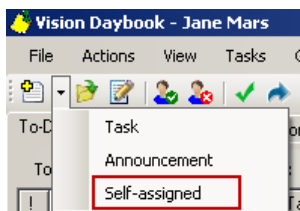
**Note** –Announcements **cannot** be edited, so be sure before you send.

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## Adding a New Self-assigned Task

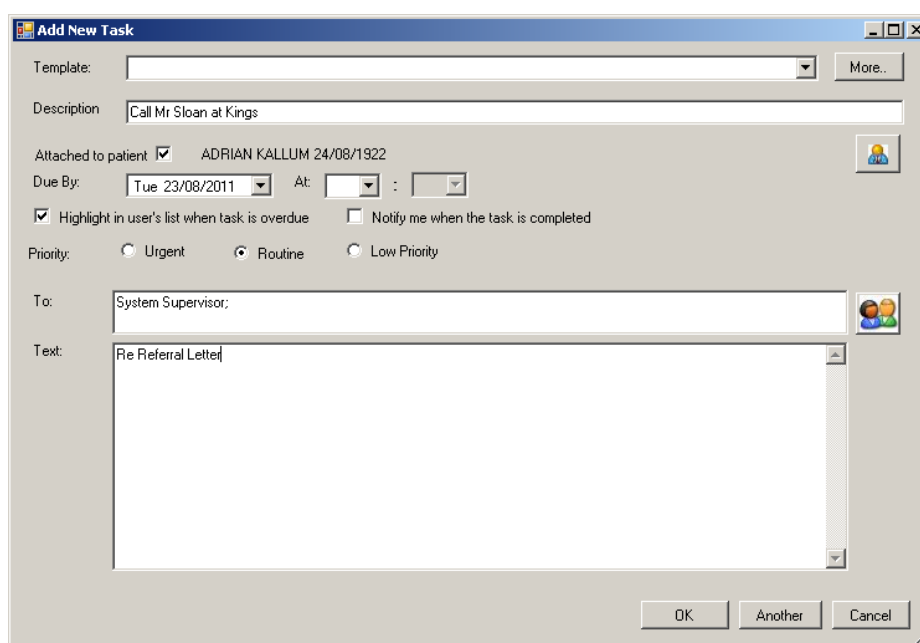
A Self-assigned Task is a way of sending a message to yourself, eg a reminder to do something. To add a self assigned task:

1. From **Daybook**, click on  and select **Self-assigned** or click on **Task** and select **New Self-assigned Task**.



*Down arrow list – Self-assigned*

2. The Self-assigned Task screen is displayed.

A screenshot of the 'Add New Task' dialog box. The 'Description' field contains 'Call Mr Sloan at Kings'. The 'Attached to patient' checkbox is checked, with the patient name 'ADRIAN KALLUM 24/08/1922' displayed. The 'Due By' field is set to 'Tue 23/08/2011'. The 'Priority' is set to 'Routine'. The 'To:' field contains 'System Supervisor;'. The 'Text' field contains 'Re Referral Letter'. The dialog box has 'OK', 'Another', and 'Cancel' buttons at the bottom.

*Example of completed Self-assigned task*

You have the following options:

- **Description** – Allows you to enter a description for the task.
- **Attached to Patient** – Allows you to attach the task to a patient.
- **Effective Date** – Allows you to select a date and a time for this task to be completed by.
- **To:** - Your details are already completed in this section, you can add further recipients if required.
- **Text** – Type any details relating to the task 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. Click on the term required and click **OK**.

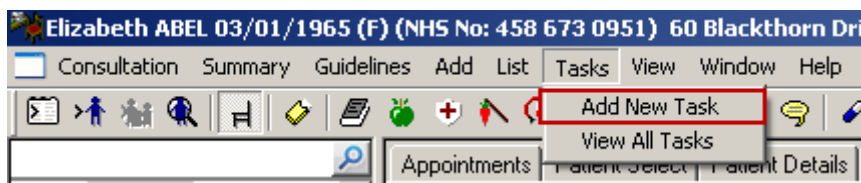
3. Click **OK** to finish.

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

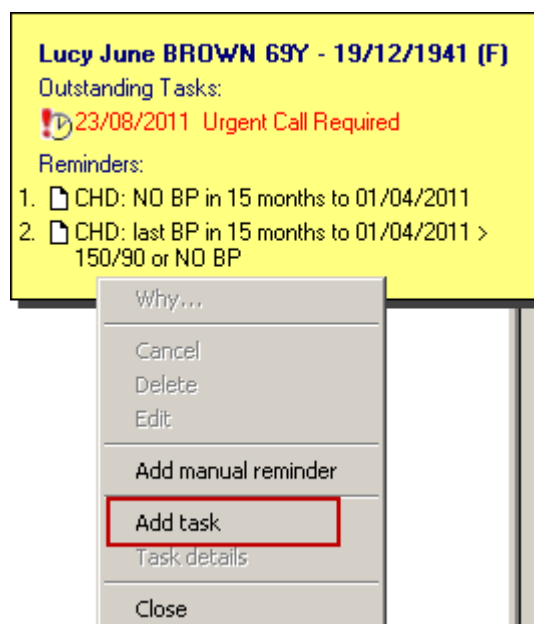
## Adding Tasks from Consultation Manager

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

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



*Consultation Manager – Tasks – Add New Task*



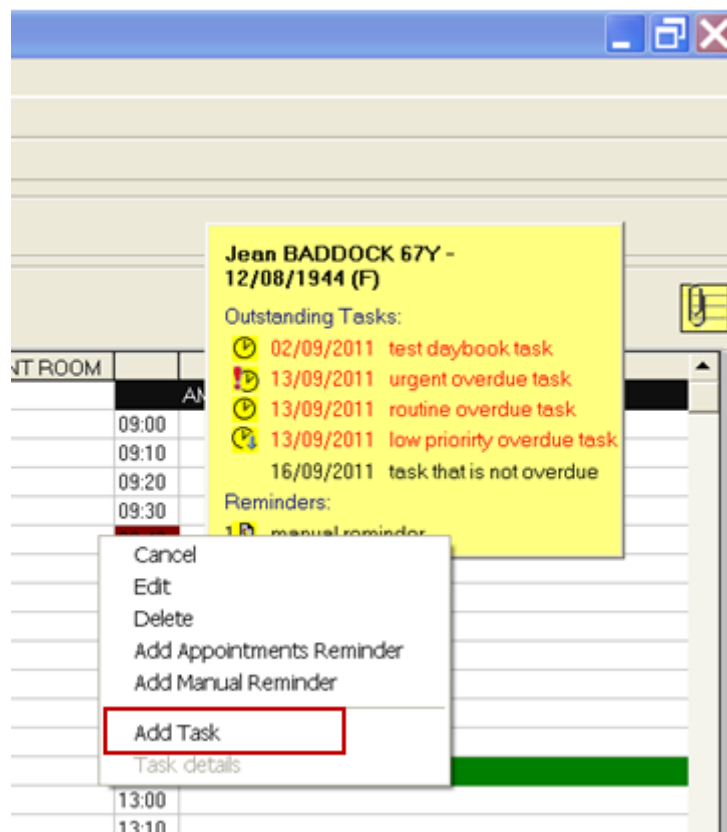
*Consultation Manager – right click on reminder – Add task*

2. **Add New Task** is displayed with the details of the selected patient completed. Complete the task details in the usual way. See “[Adding a Specific Action Task](#)” on page 7.

## 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**.



*Appointments - Reminder - Add Task*

2. **Add New Task** is displayed with the details of the selected patient completed. Complete the task details in the usual way. See "Adding a Specific Action Task" on page 7.

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## Managing Tasks

There are five tabs within Vision Daybook:

- **To Do List** – Lists all the outstanding tasks awaiting your attention. See “[To Do List](#)” on page 15.
- **My Sent Tasks** – Lists all the tasks you have sent awaiting action. See “[My Sent Tasks](#)” on page 23.
- **My Actioned Tasks** – Lists tasks you have completed. See “[My Actioned Tasks](#)” on page 24.
- **Tasks for Patient** – Lists tasks linked to a specific patient. See “[Tasks for Patient](#)” on page 25.
- **All Outstanding Tasks** – Lists all the outstanding tasks within the practice. See “[All Outstanding Tasks](#)” on page 26.

## To Do List

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 List** tab.

**Columns** - These can be moved by clicking and dragging!

**Priority** -  
 ! for Urgent, ↓ for Low priority, ⓘ for Information Only, ⌚ for Overdue and blank for Routine.

**Sorted By** - This arrow indicated which column the Daybook is sorted by.

**Show tasks assigned to:** Select from the list here to select the Tasks displayed.

**Search:** - This enables you to search all Tasks for any text.

**Category** - Self defined colour code.

Effective Date	Description	Patient	Assigned To	Assigned By	Assigned On
24/08/2011	Book man coming tod...		[All Practice Staff].Sy...	System Supervisor	24/08/2011 07:33
08/08/2011 13:01	Please Reauthorise th...	ALICE SMITH 10/10/...	System Supervisor;	Jane Mars	08/08/2011 13:01
08/08/2011 09:54	Please Reauthorise th...	VIVIENNE DUNHILL ...	System Supervisor;	Jane Mars	08/08/2011 09:54

**Due / Effective Date** - Date the Task needs to be completed by.

**Task / Description** - Brief Description of the Task.

**Patient** - Name and DOB if the Task is linked to a patient.

**Assigned To** - Who the Task is allocated to.

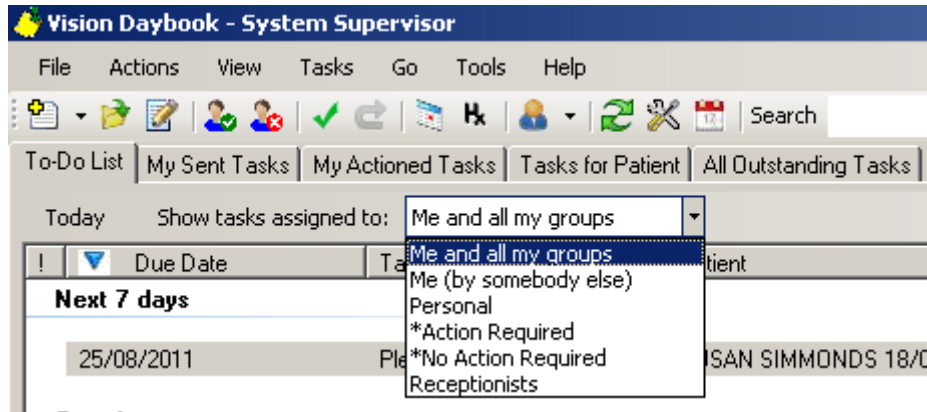
**Assigned By** - Who initiated the Task.

**Assigned On** - Date the Task was initiated.

Vision Daybook - To-Do tab

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

- **Me and all my groups** - The individual plus any groups they belong to.
- **Me (by somebody else)** - The individual by some body else.
- **Personal** – Self-assigned.
- **Groups by name** - Separate groups the individual belongs to.



*Example of the To-Do List filter*

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

!	When ordered by priority, items are grouped according to whether they are Urgent <b>!</b> , Routine, Low <b>↓</b> , Replies or notifications of Returned Tasks.
Due Date	Groups items according to Due Date in the following categories: <ul style="list-style-type: none"> <li>• Overdue</li> <li>• Today</li> <li>• Next 7 days</li> <li>• Future</li> </ul> An option can be set to automatically navigate to today when the list is opened.
Task	The short description of the task. This can be sorted alphabetically.
Patient	The name and date of birth of the patient attached to the task, blank if there is no patient. Can be sorted alphabetically
Assigned To	The full list of recipients of the task.
Assigned By	The person who raised the task.
Assigned On	The date and time that the task was raised.
# (Category)	Groups the items according to user-defined categories.

The To-Do List 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 click on an item, a reading pane maybe displayed (See [Lists](#) on page 31 ) containing:

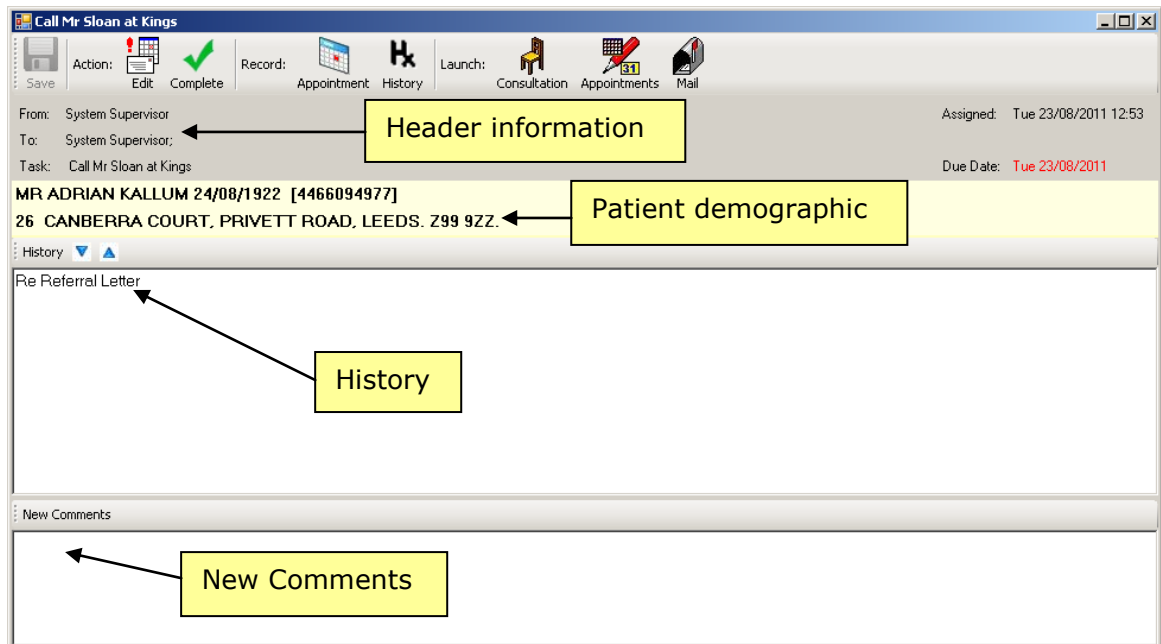
- Full text as entered when the task was defined.
- Any comments or actions added by recipients of the task. This acts as the audit trail for the task.

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 "[Start Up and Alerts](#)" on page 29).

## Actioning Tasks


To action a task that has been allocated to you from the **To-Do List**:

1. Double click on the task.
2. The task opens displaying the following:
  - The grey shaded area displays the header information for this task.
  - The patient demographic is displayed where appropriate.
  - **History** shows the full audit trail of this task to date, this includes the task itself.
  - **New Comments** is for you to record your actions.



*Open task*

3. Action the item as required using:

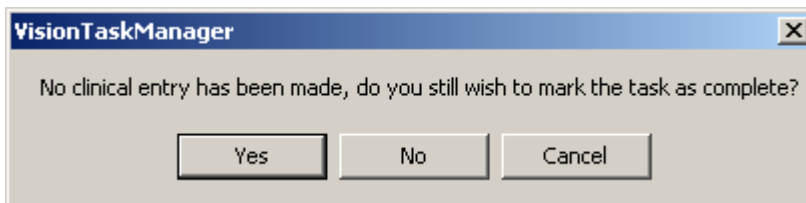
-  **Save Changes and exit** – Saves any new comments you have made and then closes. Comments are prefixed with your name and a time stamp automatically and are visible to all.



- **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.



- **Complete** – Select once 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 click **OK**, or select **Cancel** to continue without recording data. If **Cancel** is selected the **No clinical entry has been made** message is displayed, click **Yes** if you want to mark it as complete without adding a clinical entry, or **No** to leave it as outstanding.

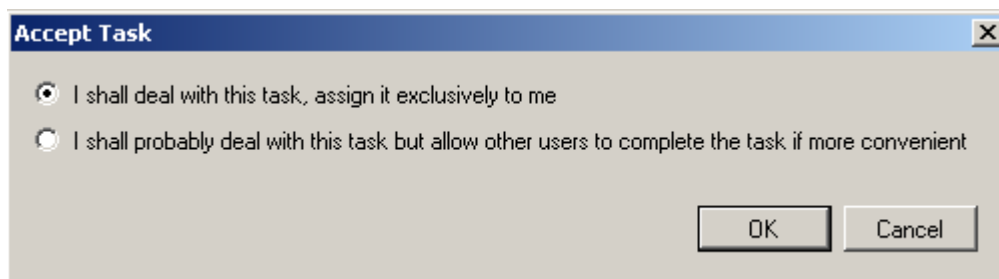


*Confirm no clinical entry made message*

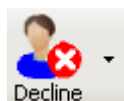
The *Complete the task or press escape to leave outstanding* screen is displayed. Add text and tick **Send notification to the Author's to-do list** if appropriate. Click **OK** to save and close.



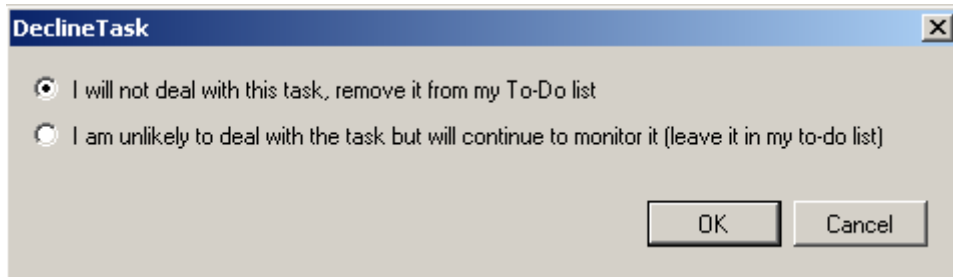
- **Accept** **Claim or express interest** – Select this option to accept a task that has been sent to more than one member of staff. The *Accept Task* screen is displayed, select either ***I shall deal with this task, assign it exclusively to me*** which removes it from everyone else's To-Do List, or ***I shall probably deal with this task but allow other users to complete the task if more convenient*** which leaves it available to be picked up by other staff members. Click **OK** to save and close selection.



*Accept Task screen*



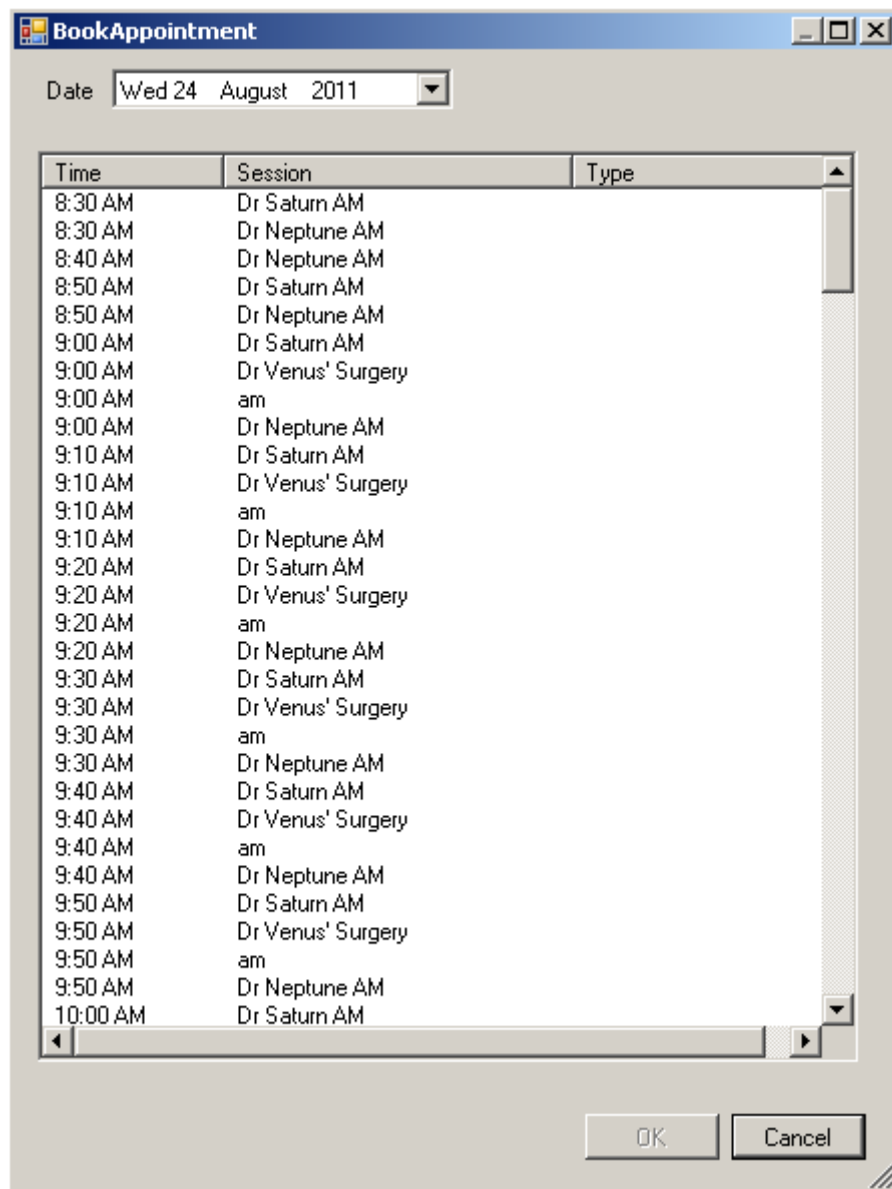
- **Decline** **Decline task** – Select this option to decline the task, the *Decline Task* screen is displayed, select either ***I will not deal with this task, remove it from my To-Do list*** which removes the item from your To-Do list, or ***I am unlikely to deal with the task but will continue to monitor it (leave it in my to-do list)*** which leaves the item in your To-Do list. Click on **OK** to save and close selection.







*Decline Task screen*



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

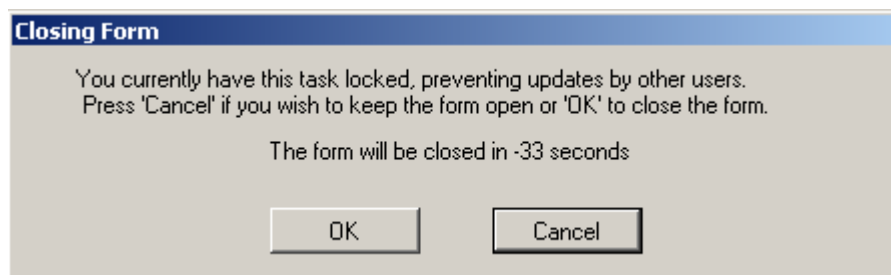


*Book Appointment screen*

- 
 History **Record Clinical Data** – This displays a **History – Add** screen that can be completed in the usual way. This enables you to record data in the selected patient’s record.
- 
**Launch Consultation Manager** - This launches **Consultation Manager** and selects the patient assigned to the task. The task remains open.
- 
**Launch Appointments** - This launches **Appointments**. The task remains open.
- 
**Launch Mail Manager** - This launches **Mail Manager**. The task remains open.

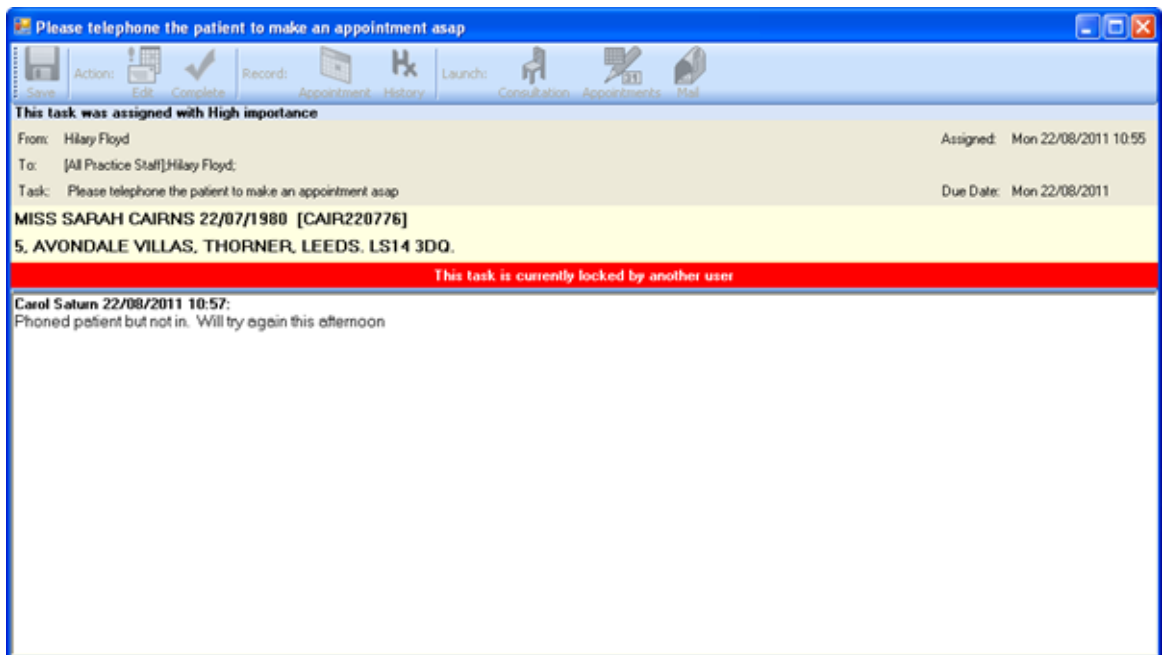
If you open a task and leave it open for longer than 4 minutes with no interaction, the **Closing Form** is displayed.

- Click **OK** to close the task.
- Click **Cancel** to close the Closing Form.



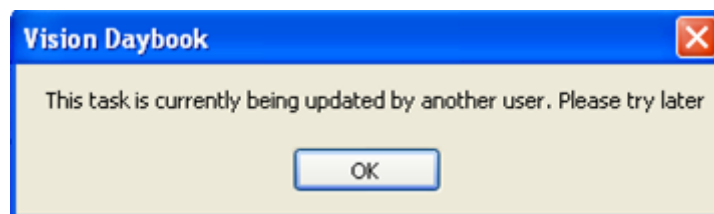
*Closing Form*

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.



*Task with The task is currently locked by another user bar displayed*


If you try to action a Task ie **Complete** one, that is in use by another member of staff a **This task is currently being updated by another user** message is displayed.

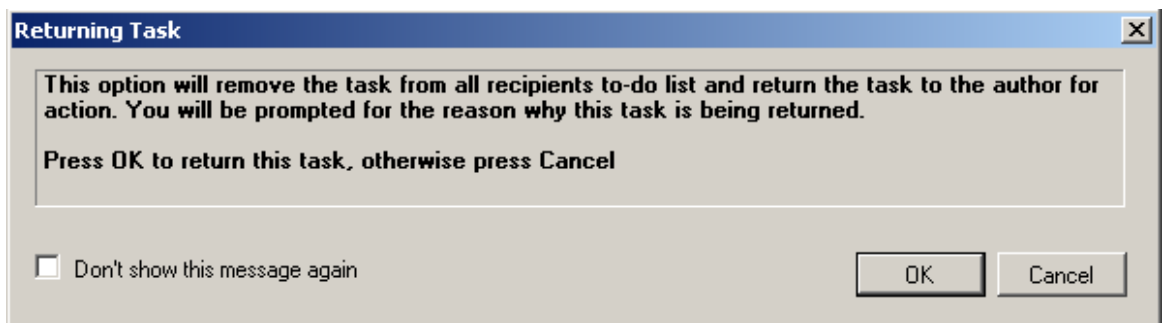


*In use by another member of staff message*

### Returning Tasks

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

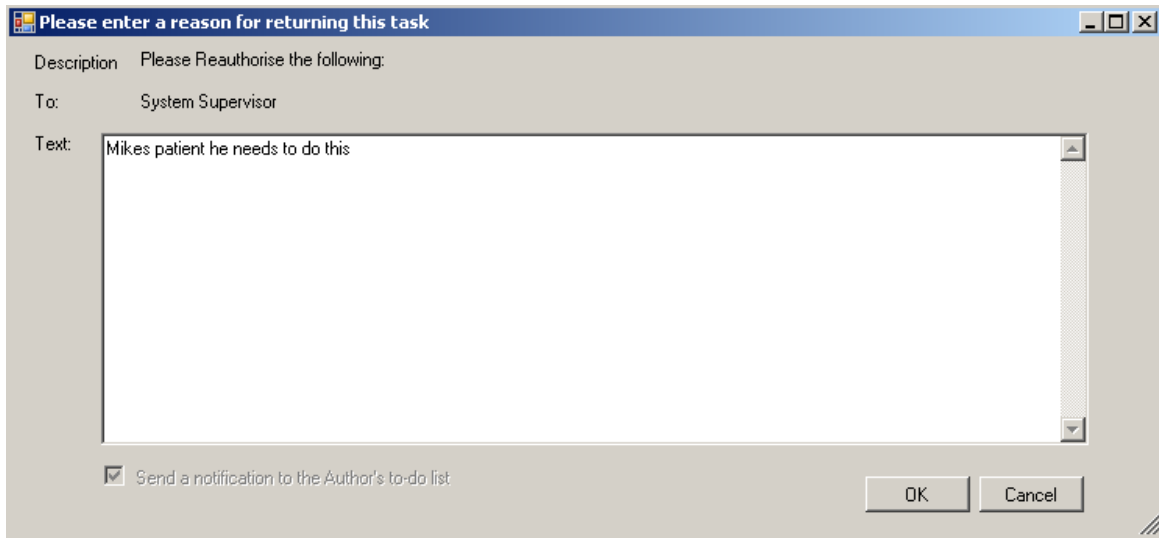
1. Highlight the task and click .
2. The first time this is done the Returning Task screen is displayed. This screen explains you need to add a return reason.



*Returning Task screen*

3. Tick **Don't show this message again** if you do not want to be reminded of this every time.

4. Click **OK**.
5. The **Please enter a reason for returning this task** screen is displayed.  
Enter a valid reason into the Text box.



The screenshot shows a dialog box titled "Please enter a reason for returning this task". The dialog has a description field with the text "Please Reauthorise the following:", a "To:" field with the text "System Supervisor", and a "Text:" field containing the text "Mikes patient he needs to do this". At the bottom left, there is a checked checkbox labeled "Send a notification to the Author's to-do list". At the bottom right, there are two buttons: "OK" and "Cancel".

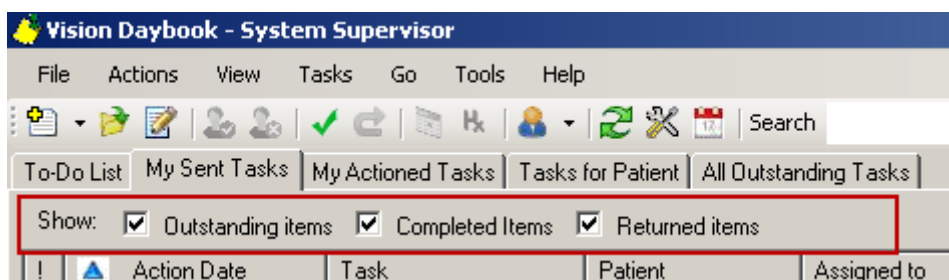
*Please enter a reason for returning this task screen*

6. Click **OK** to save and close.

## My Sent Tasks


The **My Sent Tasks** tab displays all the tasks created and distributed by you that are either still outstanding or completed/return to sender. The tasks can be filtered using the **Show** options:

- Outstanding items
- Completed items
- Returned items



*My Sent Tasks tab with Show options*

Outstanding items can be:

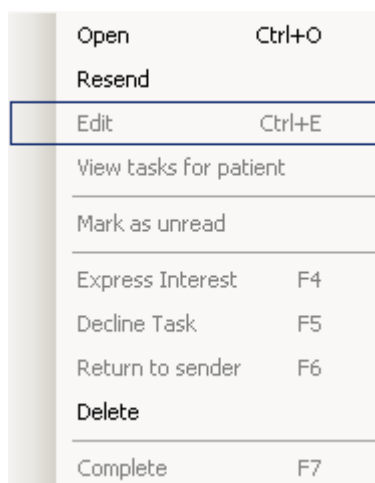
- **Edited** - Click  on the tool bar. Click on **OK** to accept any changes. The edited task automatically updates as unread for all its recipients.
- **Resent** - Select **Edit** and then click **OK**.
- **Deleted** - Right click on the task and select **Delete**.

Completed items can be:

- **Resent** - Right click on the task and select **Resend**.
- **Deleted** - Right click on the task and select **Delete**.

Returned items can be:

- **Resent** - Right click on the task and select **Resend**.
- **Deleted** - Right click on the task and select **Delete**.




*Right click menu*

## My Actioned Tasks

The **My Actioned Tasks** 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:

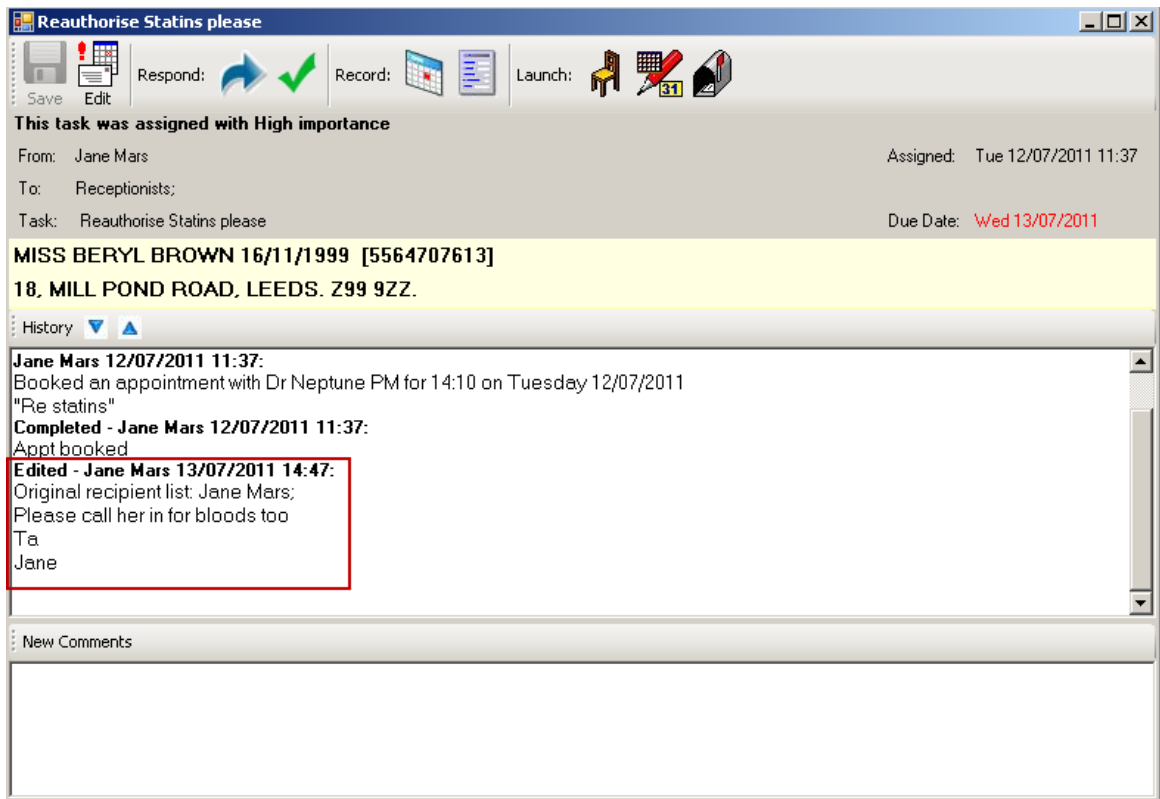


*Example of completed task*

1. From the **My Actioned Tasks** tab, double click on the task and select  **Reissue**.
2. **Reissue Task** is displayed; enter the task details in the usual way.

*Reissue Task*

3. Click on **OK** to send and close. The History of the task is retained for audit purposes and the Reissue is displayed in History as an edit.

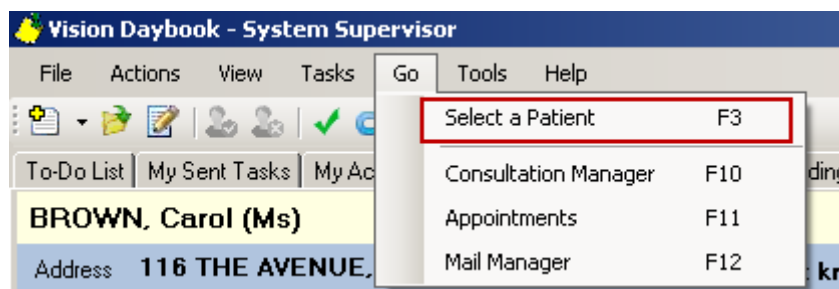


*Example of Reissued Task*

## Tasks for Patient

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

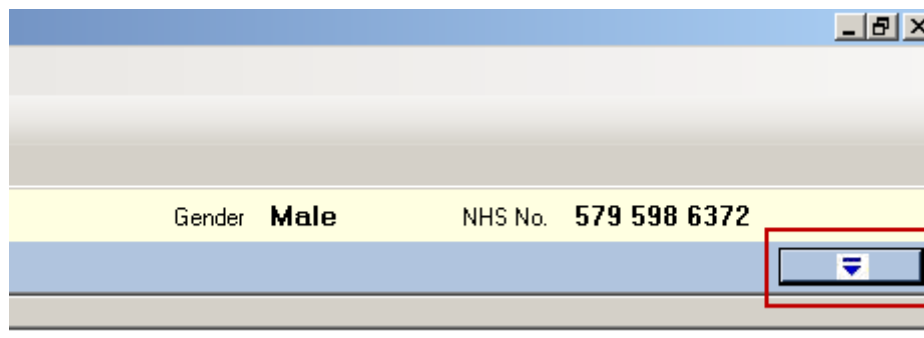
1. From any tab, press <F3>, or select **Go – Select a Patient**.



*Go – Select a Patient*

2. The Vision Select Patient screen is displayed; select the **Search Attribute** required from the list and then type the search criteria into **Search Details**. Click on **Find**.
3. A list of patients that match your criteria is presented. Highlight the patient required and click **OK**.
4. The **Tasks for Patient** tab is displayed with all tasks available for the selected patient visible. Double click on any of them to view the detail and action as appropriate.

To view the full address details for a patient from Tasks for Patient, click on the bar under the NHS number details.



*Full address bar*

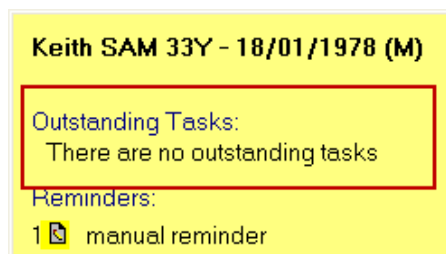
## All Outstanding Tasks

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 Self –assigned Tasks.

It is possible to claim and action any of these tasks from this tab, by double clicking on the task and processing in the usual way. See “[Actioning Tasks](#)” on page 17.

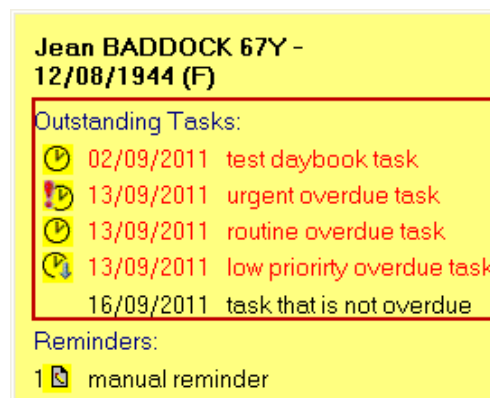
## Managing Tasks from Consultation Manager

Outstanding tasks are displayed at the top of Reminders within Consultation Manager on each patient. If there are no Outstanding Tasks, Reminders displays “*There are no outstanding tasks*”.



*No outstanding tasks*

If there are outstanding tasks for the patient, they are displayed.



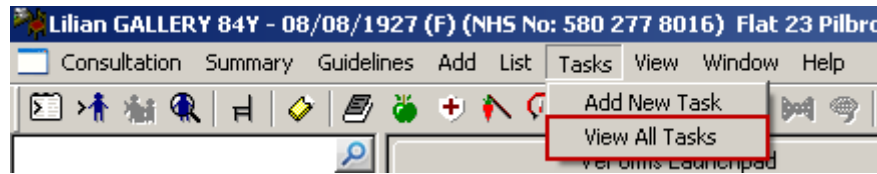
*Outstanding tasks*

To action the task from Consultation Manager:

1. Right click on the outstanding task and select **Task details**.
2. Action the task in the usual way. See "Actioning Tasks" on page 17.

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

1. Select **Tasks – View All Tasks**.

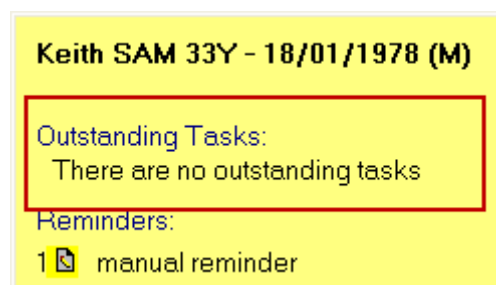


*Tasks – View All Tasks*

2. **All Task** displays. Tasks can be actioned in the usual way. See "Actioning Tasks" on page 17.

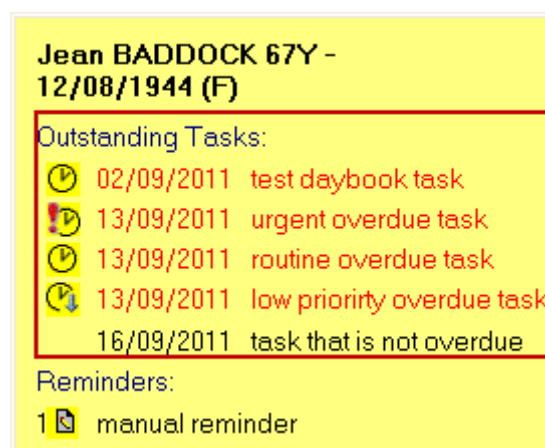
## Managing Tasks from Appointments

Outstanding tasks are displayed at the top of Reminders within Appointments. If there are no Outstanding Tasks, Reminders displays "There are no outstanding tasks".



*No outstanding tasks*

If there are outstanding tasks for the patient, they are displayed.



*Outstanding tasks*

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" on page 17.

---

## Managing Notifications and Announcements

Notifications and Announcements (referred to here as Announcements) are displayed in the bottom section of the **To-Do List** (see [To Do List](#) on page 15). They are for information and reference only and do not require actioning. As Announcements all have an expiry date included, 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 **To-Do List**, right click on the Announcement you wish to remove.
2. Select **Hide**.

---

**Note** – You cannot unhide an Announcement, **Hide** acts very like a delete option.

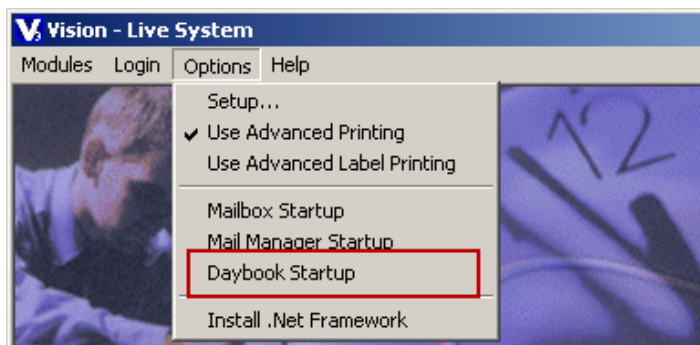
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---

## Set up

To set Daybook to open automatically when you log into Vision:

1. From Vision front menu, select **Options – Daybook Startup**.



*Vision front Menu – Options – Daybook Startup*

## 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**. By default everyone has full access to Daybook; this should be left so that all staff can access their own tasks.

### England

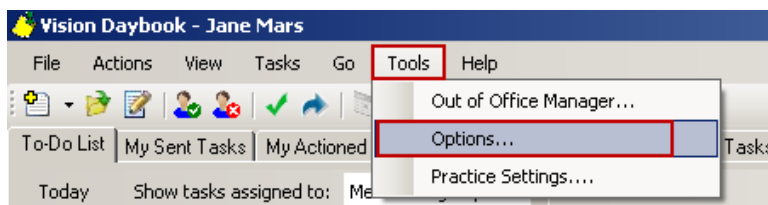
If you have Role Based Access Control (RBAC) enabled, you must ensure that you contact your Registration Authority (RA) to add Daybook access to all your staff. The two RBAC activities linked to Vision Security Function for Daybook are:

- **B0093** Create Work Item

## Options

To set up the options within Vision Daybook:

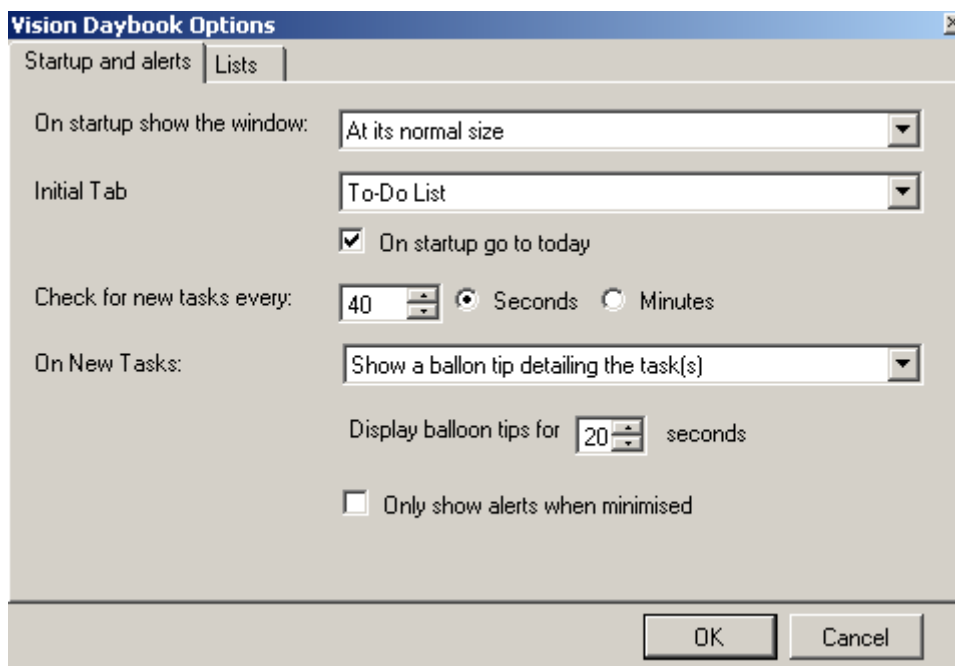
1. From **Vision Daybook**, select **Tools - Options**.



*Vision Daybook – Tools - Options*


2. The Vision Daybook Options screen is displayed. There are two tabs:

### Start Up and Alerts



*Vision Daybook Options*

**On startup show the window** - Allows you to select how you want to initially display Vision Daybook:

- **At its normal size** – Partial screen.
- **Minimised in the system tray** -  appears in the system tray in the bottom right corner of your screen. Daybook also appears minimised on your Taskbar.
- **Maximised** – Full screen.

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


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

- **My Sent Tasks** – lists tasks you have created.
- **My Actioned Items** – lists completed tasks.
- **Tasks for Patient** – lists tasks for a specific patient.
- **All Outstanding Tasks** – lists all outstanding tasks for all staff.

**On Startup go to today** – Tick to display tasks that need to be dealt with today as the starting point within Vision Daybook.

**Check for new tasks every** - Select a time period for new tasks to be checked for by using the up and down arrows and then selecting **Seconds** or **Minutes**.

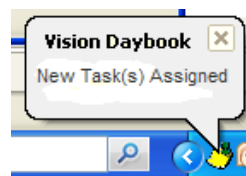
**On New Tasks** – allows the selection of which icon is displayed when a new task is received:

- **Highlight the icon but do not show balloon tips** -  The Daybook icon within the system tray turns yellow when new tasks are allocated to you.
- **Show a balloon tip detailing the task(s)**: A balloon notification displays the task detail in it when a new task is allocated to you.



*New Task Assigned From*

- **Show a 'New Tasks' balloon tip**: A balloon appears with *new Task(s) Assigned* when a new task is allocated to you.



*New Tasks Assigned*

---

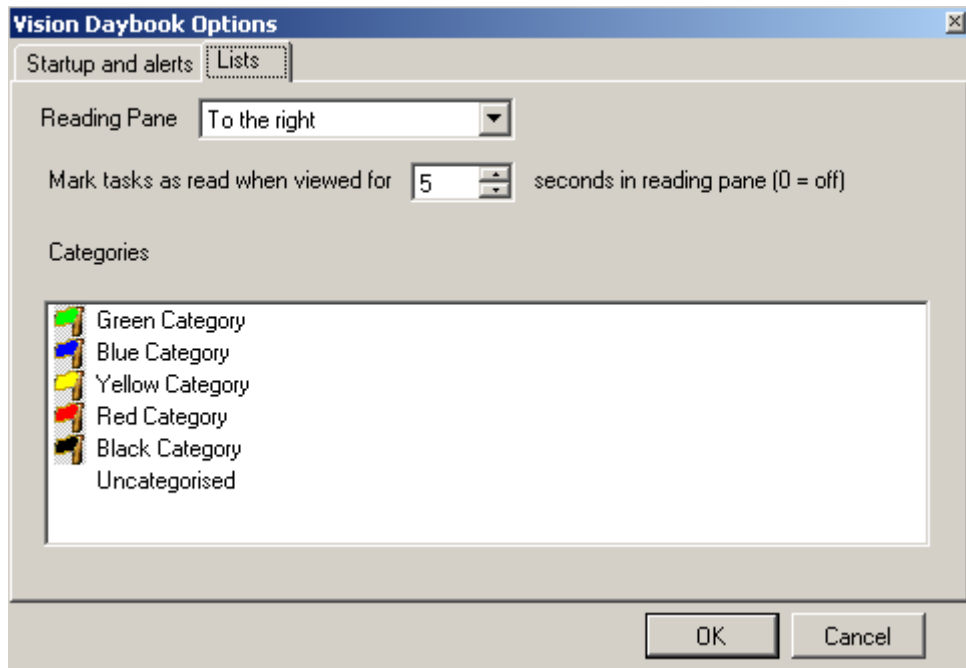
**Note** - The icon for no new task received is the **Inactive icon** 

---

**Display Balloon tips for n seconds** - Select a time for the system tray balloon tips to display by using the up and down arrows.

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

## Lists

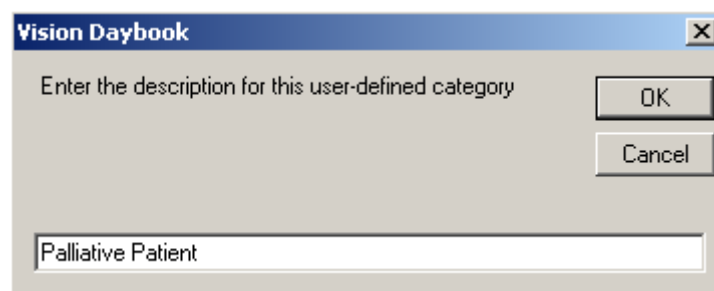


*Vision Daybook – Options –To-Do List tab*

**Reading Pane** - Select **To the right**, **At the bottom** or **Off** from the available list to determine where the Reading Pane is displayed. The Reading pane can be set differently for each tab, see [Reading Pane](#) on page 32.

**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.

**Categories** – You can categorise your tasks for your own reference using different colour flags. The text associated with the flags is changed by right clicking on the flag and selecting **Rename**. Type in the new text and then click **OK** to save and close. To use the flags see “[User Specific Categories](#)” on page 38.



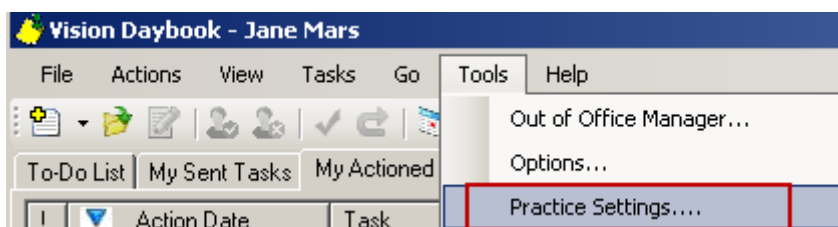
*Right click - Rename*

Click **OK** to save and close Vision Daybook Options.

## Practice Settings

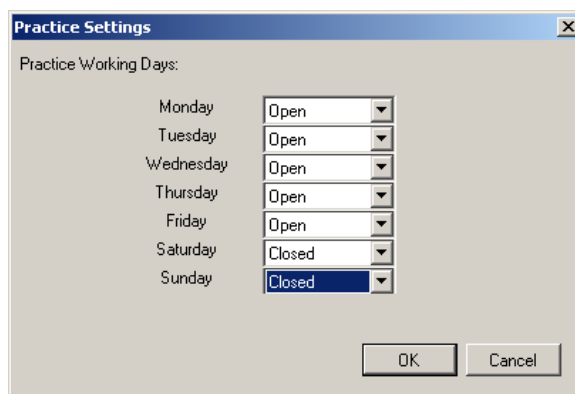
Practice settings are used by Vision Daybook to work out when a task is due; it enables the system to skip weekends when a due date is entered as nn days (where nn is a number)

1. From **Daybook**, select **Tools – Practice Settings**.



*Tools – Practice Settings*

2. The **Practice Settings** screen is displayed. Using the available lists of Open and Closed, select the days your surgery is closed.



*Practice Settings with Saturday and Sunday closed*

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

---

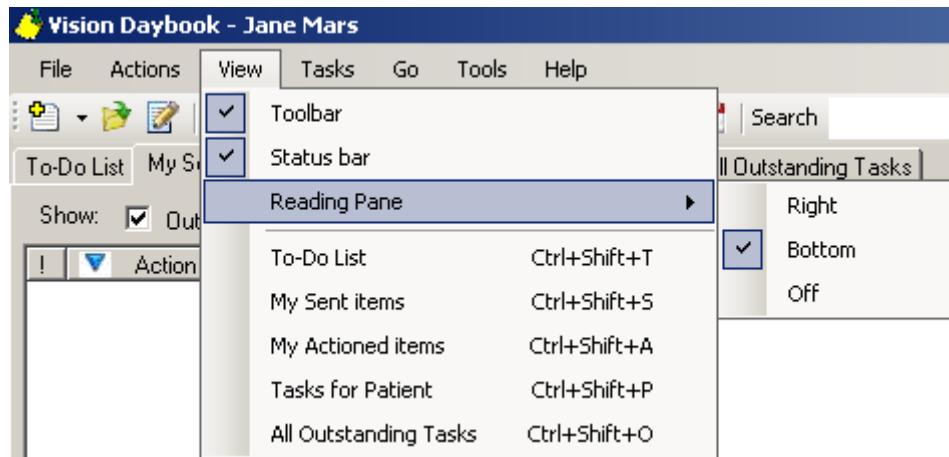
**Important** – This is a Practice wide setting, not an individual setting.

---

## Reading Pane

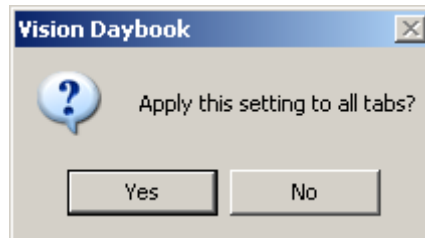
You can set the Reading Pane to display in a different place for each tab if required:

1. From **Daybook**, select the tab you wish to set the Reading Pane for.
2. Select **View – Reading Pane** and then either **Right, Bottom** or **Off**.



*View – Reading Pane*

3. **Apply this setting to all tabs?** is displayed, select:
- **Yes** – All tabs will have the Reading Pane in the same place.
  - **No** – Only the Reading Pane on this tab will be updated.



*Apply this setting to all tabs? message*

---

## Task Management

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

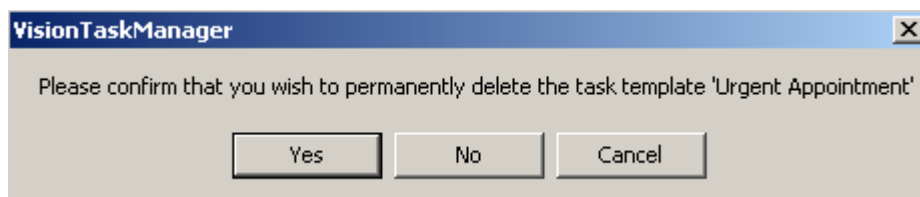
- **Task Templates** – Enables templates to be set up for common tasks.
- **Maintain Frequent Task List** – Ensures the templates you use most are offered first.
- **User Specific Categories** – Allows you to colour code for your own tasks.
- **Out of Office** – Notifies anyone allocating a task to you that you are not available.
- **Archive Old Tasks**– Enables you to set an individual archiving protocol to manage your initiated tasks

### Task Templates

Many tasks have certain things in common, ie 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 to speed up the entry of more common tasks. These can be created, edited and deleted by anybody on the system.

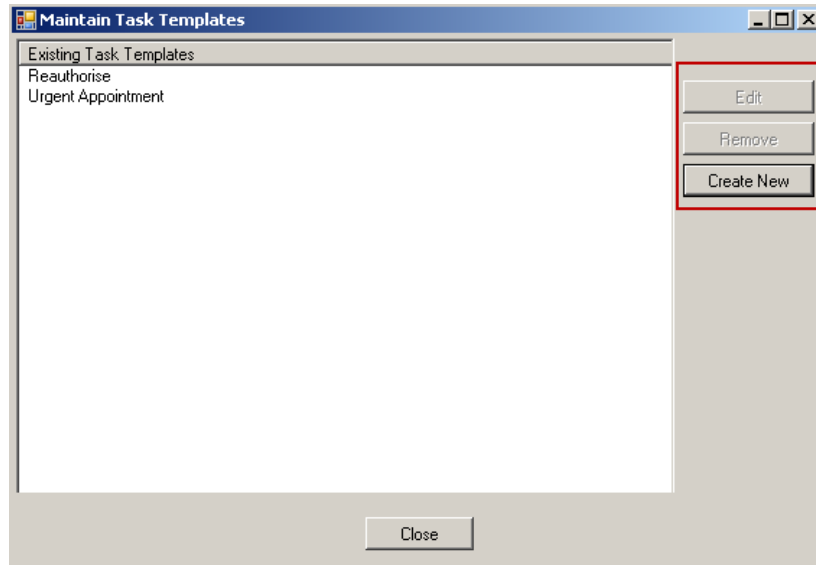
To maintain Task Templates, from Daybook, select **Tasks - Maintain Task Templates**, select the action you require:

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



*Remove confirmation message*


- **Create New** - To add a new template, select **Create New**. See [Adding a New Task Template](#) on page 35.



*Maintain Task Template screen*

## Adding a New Task Template

To add a new task template to Daybook:

1. From **Daybook**, select **Tasks – Maintain Task Template**.
2. Click .
3. **Add Task Template** is displayed.


*Add Task Template*

4. Complete the template with as much information as you can:
  - **Template Name** – Enter a name for the template.
  - **Task Description** – Describe the task being requested.
  - **Tasks created from this template are normally attached to a patient** – Tick if this is required.
  - **Default due date** – Enter the normal time span required ie 3d for 3 days, 1w for 1 week.
  - **Highlight when the task is overdue** - Tick if this is required.
  - **Default priority** – Select Routine, Urgent or Low Priority from the list.

---

**Note** – The default priority is Urgent.

---

- **Default recipients** – Select individual staff members and/or staff groups if required by clicking on , expanding the lists of staff and groups and ticking against them.

---

**Remember** – Staff Groups are set up through Control Panel.

---

- **On Completion Notify the author** – Tick if required.
- **On Completion Add Record** – Tick if required. A Read Dictionary screen is displayed. Select the Read code you require and click **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.

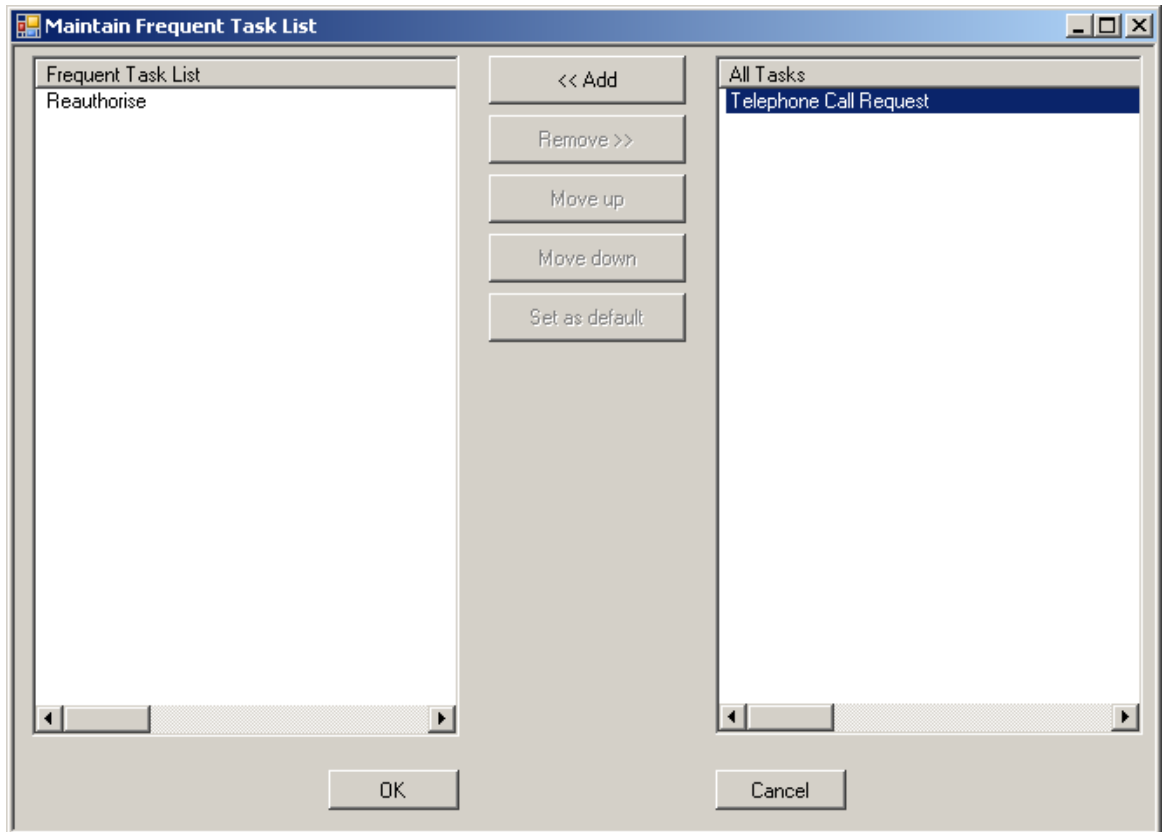
---

- **Initial Text** – Enter any text that is valid for this request.
5. Click on **OK** to save and close.

## Maintain Frequent Task List

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

1. From **Daybook**, select **Tasks - Maintain Frequent Task List**.
2. The **Maintain Frequent Task List** is displayed.



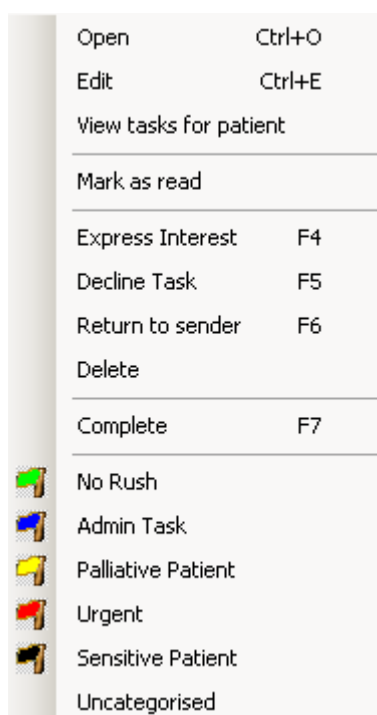
*Maintain Frequent Task List screen*

3. All available task templates are listed under **All Tasks**. Click on the template you want to promote to the **Frequent Task List** and click **<<Add**.
4. Repeat step 3 until all the frequently used templates are listed under **Frequent Task List**.
5. To promote or demote templates within the **Frequent Task List**, highlight the task required and then click **Move up** or **Move down**.
6. To remove task templates from the **Frequent Task List**, highlight them and click on **Remove>>**.
7. Click **OK**.

## User Specific Categories

You can categorise tasks in your **To-Do list**. The categories have default text but this can be changed through **Tools – Options – To-Do List** tab, see “List” on page 31. There are five categories on the right-mouse menu from any outstanding task:

1. Click on the task to categorise and right click.
2. Click the Category you require.



*Right click menu showing renamed Categories*

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

To-Do List							
My Sent Tasks   My Actioned Tasks   Tasks for Patient   All Outstanding Tasks							
Today Show tasks assigned to: Me and all groups							
#	Due Date	Task	Patient	Assigned To	Assigned By	Assigned On	#
<b>Next 7 days</b>							
	10/08/2011	Please Reauthorise th...	VIVIENNE DUNHILL ...	All Gps;	Jane Mars	08/08/2011 10:19	Yellow
<b>Today: Monday 08/08/2011</b>							
⌚	08/08/2011 08:00	Please Reauthorise the foll...	MARTYN DUANE 28/03/...	All Gps;	Jane Mars	08/08/2011 08:59	Green
	08/08/2011	Call Mr Smith at Kings	ARTHUR IAN 28/03/...	Jane Mars;	Jane Mars	08/08/2011 08:25	Red
<b>Overdue</b>							
⌚	26/07/2011	Please call this patient	LILIAN GALLERY 08/...	Jane Mars;	System Supervisor	19/07/2011 13:10	Black


*To-Do List with category flags*

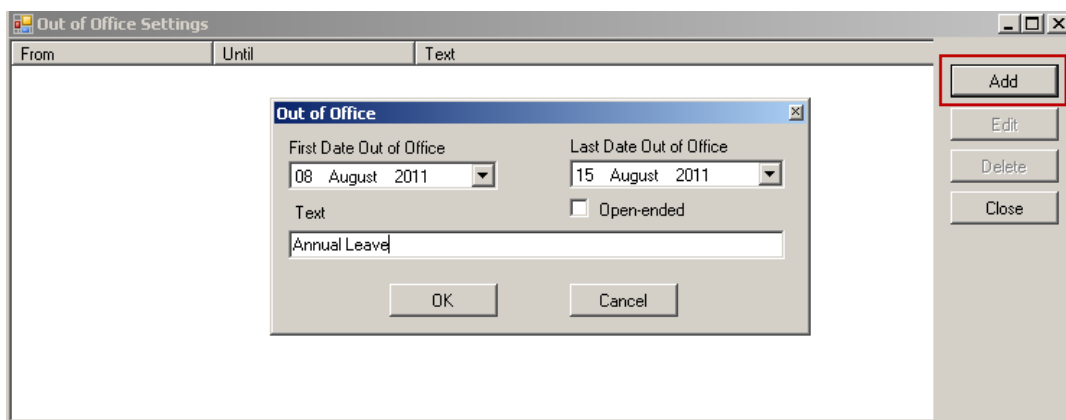
## Out of Office

You can set a number of Out of Office flags to prevent urgent tasks being 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**, click , or go to **Tools - Out of Office Manager**.
2. Click **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 **Text** as required ie Annual Leave.



*Out of Office displayed over Out of Office Settings screen*

5. Click **OK**.
6. Repeat steps 2 and 3 if adding more than one period of absence.
7. Click **Close**.

If a member of staff has set an Out of Office they are displayed on the User Selection list with , if you hover your mouse over their name the message is expanded.


*Add New Task – Recipient has Out of Office set*

---

**Note** – Out of Office flags are for reference only. Tasks can still be sent to recipients that have an Out of Office flag set.

---

### **Editing an Out of Office**


1. From **Daybook**, click , or go to **Tools - Out of Office Manager**.
2. Highlight the Out of Office that needs editing and click on **Edit**.
3. The Out of Office screen is displayed. Edit as required.
4. Click **OK**.
5. Click **Close**.

### **Deleting an Out of Office**

---

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

---

1. From **Daybook**, click , or go to **Tools - Out of Office Manager**.
2. Highlight the Out of Office that needs deleting and click on **Delete**.
3. Click **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 and set up.

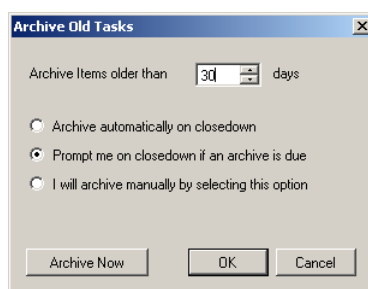
---

**Important** – Archive is a personal setting. The items archived are the Tasks assigned by you only, therefore all Daybook users must set their own protocol.

---

### Archiving Tasks

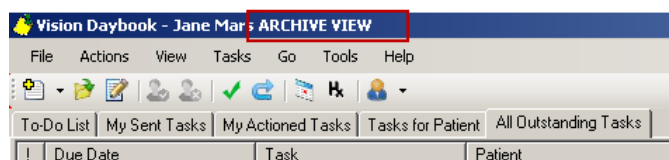
1. From **Daybook**, select **File – Archive**.
2. Select how old the tasks should be before archiving by either over typing the number of days, or using the arrows.
3. Select how you want the archiving to take place by clicking one of the following:
  - **Archive automatically on closedown**
  - **Prompt me on closedown if an archive is due**
  - **I will archive manually by selecting this option** – use the **Archive Now** button to do this.
4. Click on **OK**.



*Archive Old Tasks*

### Viewing Archived Tasks

1. From **Daybook**, select **File – Archive View**.
2. Archived tasks are now displayed on the Daybook screen, and Archive View is added to the staff name at the top of the screen.



*Archive View header*

3. Archived items are read only. To restore an item from Archive, right click on it and select **Restore**.
4. To close the Archive View, select **File – Archive View** again and you are returned to the current task lists.

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## Troubleshooting

### Workstation Access to PostgreSQL

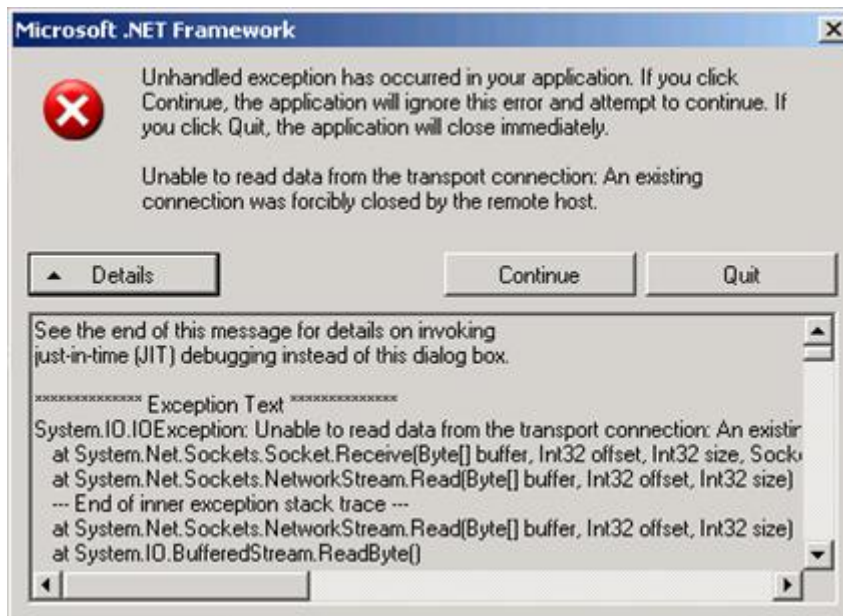
In order for Daybook to run, the PostgreSQL database must be installed on your workstation, PostgreSQL was released as part of DLM345 PostgreSQL. If your workstation cannot access the PostgreSQL database and you try to access any of the Daybook functionality, the following errors are displayed:

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**Note** - Until this issue is resolved none of the Daybook functionality is available from this workstation:

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#### Daybook Module

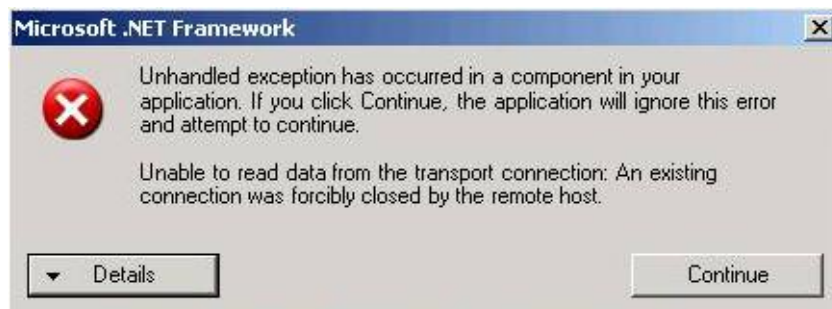


*Microsoft .NET Framework error*

If you click Continue, the Daybook module opens but is not usable.

#### Consultation Manager and Appointments Modules

If you access any Daybook utilities from either the Consultation Manager or Appointments modules, the truncated version of the error message is displayed:



*The truncated Microsoft .NET Framework error*

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**Important** - Please contact the INPS Helpdesk to resolve this issue.

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## Appendix 1 – Daybook Task Scenarios

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

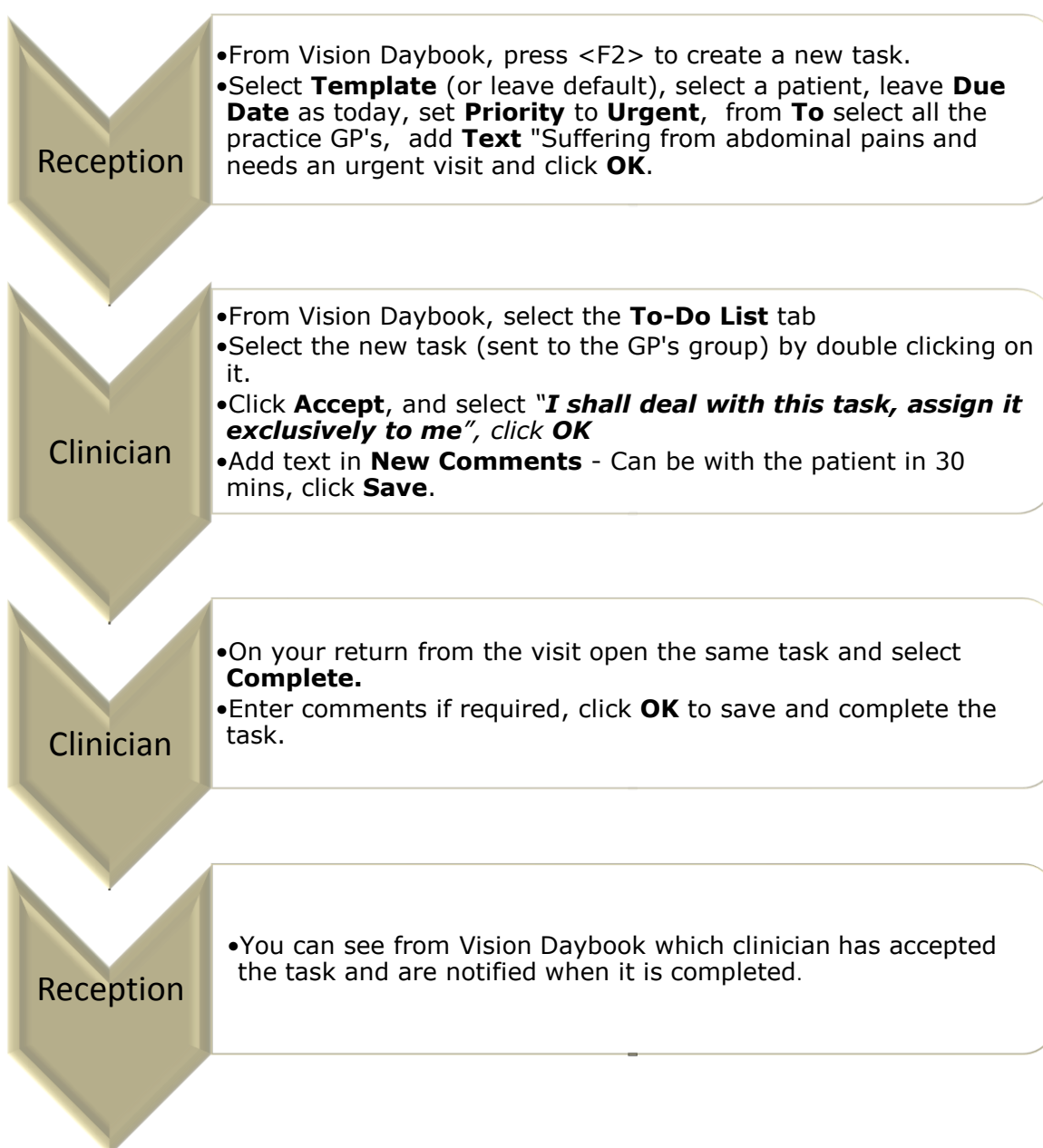
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**Note** - These examples are for use **after** basic training on Vision Daybook has been completed.

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### Visit Request

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



## 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 **Text** "New tablets causing vomiting, would like some advice" and click **OK** .

Clinician

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

Reception

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