



Daybook Quick Reference - Task Templates

Many tasks have certain things in common, eg '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 for selection when creating a task to speed up the entry of more common tasks. These can be created, edited and deleted by anybody on the system.

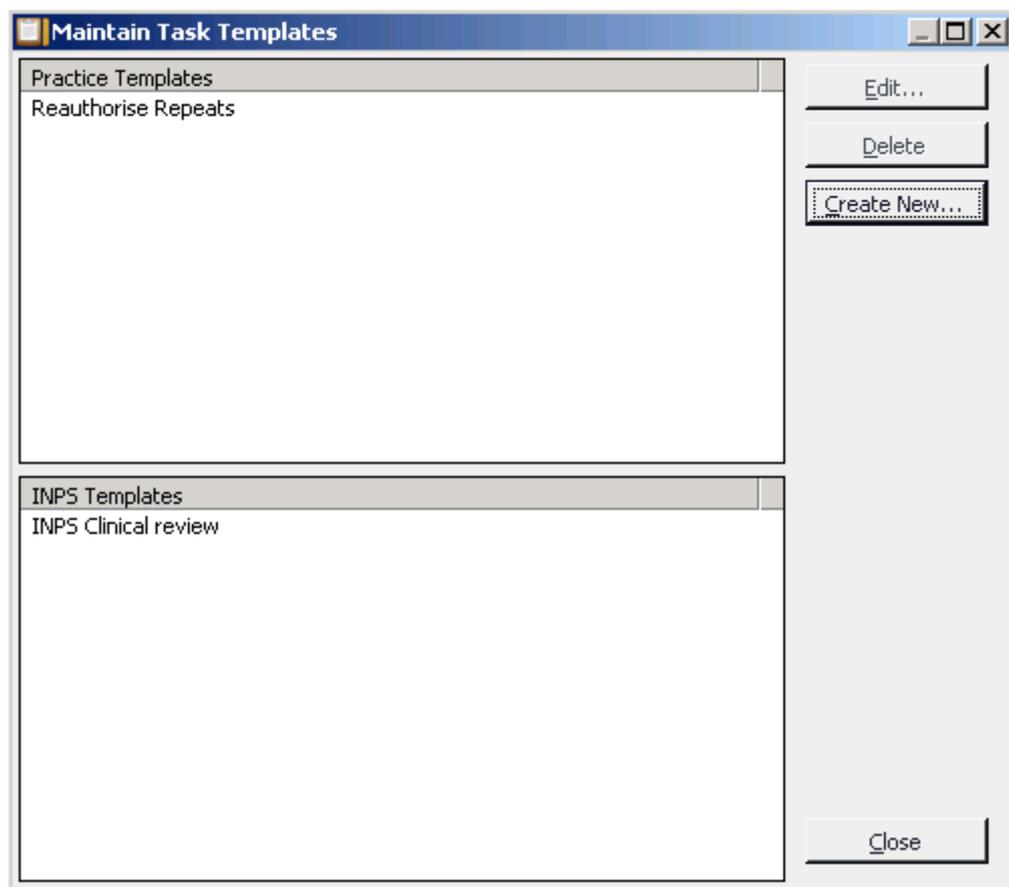
To create and maintain Task Templates:

1. From Daybook select the Maintenance tab.



2. Select Task Templates [Task Templates](#) and select the action you require:

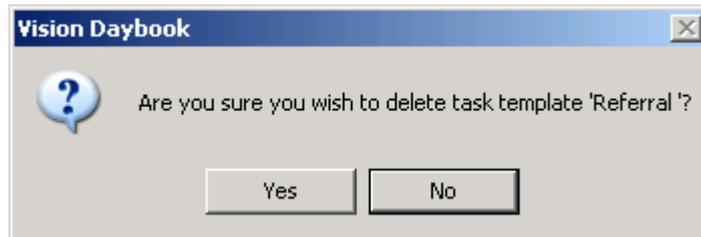
- **Create New** - To add a new template, select **Create New**. See [Creating a Task Template](#) (page 2).



Maintain Task Template screen

- **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.

- **Delete** - To delete an existing template, click on the template and select **Delete**. Click on **Yes** to the confirmation message.



Remove confirmation message

Creating a Task Template

To add a new task template to Daybook:

 **Note** - Check there is not already a Template for this task; Daybook does not check for duplicate Templates.

1. From Daybook select the Maintenance tab.



2. Select Task Templates and click .

3. **Add Task Template** is displayed.

4. Complete the template with as much information as you can, use the comments on the form for completion guidance, see overview below:

 **Note** – Any Read code entered here is recorded to the patient's record and should therefore be accurate and QOF appropriate.

5. Click on **OK** to save and close.

Template Name - Enter an appropriate original name for the template

Task Description - Describe the task, this task is displayed when adding the task from a template list

Tasks created from this template are normally attached to a patient - Tick if this task should be attached to a patient

Default priority - Select Routine, Urgent or Low Priority from the list

Default recipients - Staff can be selected by typing their initial letter as well as by clicking on **Choose...**

Clinical document - Tick to attach a clinical document

Default due date - Enter the normal time span required, eg 3d for 3 days, 1w for 1 week

Escalate priority, if not completed after - Check to set the priority for a task to increase if not completed by the date offset entered

On completion:

- Notify the author** - Tick if you want a notification to be created
- Add to medical history** - Tick if required. A Read Dictionary screen is displayed. Select the Read code you require and click **OK**

Initial comments - Enter any text that is relevant to this task each time

Add Task Template

Template Name: Reauthorise
The unique name of the task template to be displayed in template lists.

Task Description: Please reauthorise the following
The default description for tasks created using this template.

Tasks created from this template are normally attached:

to a patient.
 to a clinical document.

Default due date: 2d (as a date offset from date of task creation)

Default priority: Routine Escalate priority, if not completed after: (as a date offset from date of task creation)

Default recipients: Doctors; Choose...

On completion: Notify the author
 Add to medical history 8BL..00 - Other medication review Change...

Initial comments: Enter meds required here: Initial comments - Enter any text that is relevant to this task each time

OK Cancel

Add Task Template