Daybook Enhancements
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Daybook Enhancements

Summary of Changes

The following is a summary of the changes made in DLM470 to the Vision Daybook module:

New Look Daybook

- Daybook has a new ribbon toolbar selected by default. This has been designed to make the use of Daybook a more intuitive experience with all the functionality you require for day to day use. See The New Look Daybook (page 4) for details.

Daybook Options

- The Startup and Alerts tabs have been updated, see Daybook Option Changes (page 7) for details.
- A new Tasks tab has been added, see Daybook Option Changes (page 7) for details.

Traditional Menu and Toolbar View Changes

- The icons on the traditional Daybook toolbar have been updated, see Traditional Menu and Toolbar View (page 12) for details.

Task Changes

- Issuing a New Task replaces Add a New Task, see Creating a Task (page 15) for details including the following:
  - **Based upon template** allows you to directly access Maintain templates.
  - **Issued by** which allows you to select who issued the task.
  - **On completion, add to medical history** - Select to add a Read coded medical history entry to the patients record once the task has been completed.
  - **Due** - If a task is created with a due date of a practice closed date (see Practice Settings for further details on setting up opening times), Daybook now automatically updates Due to the next working day.
  - **No priority escalation** or **Escalate priority if not completed by** - This new option enables you to automatically raise the priority of a task should it not be completed by the date specified.
  - **To** - Selecting the recipient(s) of the Task by entering the first one or two letters of their name now fixed.
  - **Comments** replaces Text.
  - The tab key order for **Issuing New Task** has been updated.
The confirmation for the deletion of a task has been updated, see *Deleting a Task* (page 17) for details.

The issue with selecting **Delete** from the tool bar has been addressed. See *Deleting a Task* (page 17) for details.

The Accept and Decline buttons have been updated, see *Accepting and Declining a Task* (page 17) for details.

The text on **Accept Task** has been updated, see *Accepting and Declining a Task* (page 17) for details.

The task right click menu has been updated to include:

- **Add Comment** - Select to add free text comments to a task
- **Accept** - Replaces Express Interest, see *Accepting and Declining a Task* (page 17) for details.
- **Decline** - Replaces Decline Task, see *Accepting and Declining a Task* (page 17) for details.

**Task Template Changes**

- **Add Task Template** has been updated to include the following, see *Adding a Task Template* (page 20) for details.
  - Instructions for reference purposes on the **Add Task Template** screen when setting up a Template.
  - **Default due date** this now needs to be completed manually
  - **Escalate if not completed after** enables you to set the priority of a task to increase if not completed by the date offset entered.
  - **Default recipients**, staff can now be selected by typing their initial letter as well as by clicking on **Choose...**:
    - **Initial comments** is now retained for all tasks created from the task template.
- **Delete** replaces **Remove** within Maintain Task Templates, see *Deleting a Task Template* (page 20) for details.
- The confirmation message for the deleting of a Task Template has been updated, see *Deleting a Task Template* (page 20) for details.

**Announcement Changes**

- **Sending new Announcement** replaces the Add an Announcement screen and has been updated to include the following, see *Announcement Changes* (page 21) for details.
  - **Description** - The cursor now defaults to Description.
  - **Effective from** - Now completes with today's date by default, change if required.
  - **Expires** - Defaults to does not expire. To add an expiry date place a tick in the **Expires** check box, the date defaults to today, change as required.
  - **Comments** - The new name for Text.
• The right click menu from an announcement has been updated to include the following, see Announcement Changes (page 22) for details.
  - Add Comment.
  - Delete replacing the Hide option.

Notifications
• Notifications is a new section within the Daybook screen that displays messages that Daybook creates itself, see Notifications (page 24) for details.

General Changes
• Icons for modules recently updated throughout Vision have now been updated within Daybook.
• When making an appointment for a patient from Daybook the Slot Type and the Book Owner are now displayed.

General Fixes
• We have included a number of general fixes in the DLM 470 update, see General Fixes (page 26) for details of these.
Introduction

To coincide with the increased and more in-depth use of Daybook, we have improved some Daybook features and addressed some of the issues you have reported to us.

The New Look Daybook

When DLM 470 is installed, Daybook is updated to a new ribbon toolbar. This has been designed to make the use of Daybook a more intuitive experience with all the functionality you require for day to day use.

- With the ribbon toolbar screen, you have three tabs:
  - **Home** (Alt H) - See *Home Tab* (page 4)
  - **View** (Alt V) - See *View Tab* (page 10)
  - **Launch** (Alt L) - See *Launch Tab* (page 11)

You can revert to a traditional menu and toolbar view should you not want to take advantage of the new functionality within Daybook. To change to the traditional menu and toolbar view:

1. From the new ribbon toolbar Daybook screen, select **View**.

2. Click on **Switch to traditional menu and toolbar**.

Please refer to *Traditional Menu and Toolbar View* (page 12) for details on the changes to the traditional view.
Home Tab

**Home** - This option contains the options needed for creating and actioning tasks:

- **Task** (F2) - Select to add a task.
- **Task for me** (Ctrl +F2) - Select to create a self-assigned task.
- **Announcement** (Ctrl +F3) - Select to create an announcement.
- **Open** (Ctrl +O) - Select to open a highlighted task.
- **Add Comment** (Ctrl +W) - Select to add a comment to a task.
- **Edit** (Ctrl +E) - Select to edit a task.
- **Reissue** - Select to reissue a completed task.
- **Delete** - Select to delete tasks or announcements you created.

- **Reject** (F6) - Select to return a task, uncompleted, back to its originator. This button has been updated to match Daybook from the Vision front screen.

- **Complete** (F7) - Select to start the completion process of a highlighted task. Note, the tick is now green.

- **Accept** (F4) - To indicate to others you intend to work on this task.

- **Decline** (F5) - To indicate to others you do not intend to work on this task.

- **View all tasks** - Select to list all tasks for the patient associated with the task selected.

- **Add to medical history** (F9) - Select to add a medical history entry to the selected patient's record.

- **New appointment** (F8) - Select to add a new appointment to a selected patient.

- **Consultation Manager** - Select to open Consultation Manager. If a patient has been selected.

- **Select a Patient** - Select to search for a patient.

- **Edit contact details** - Select to update the contact details of the selected patient.

- The patient name is displayed under this section to act as a reminder for which patient record the above actions will update.

- **Task templates** - Now available from the toolbar, select to access Maintain Task Templates.

- **Frequent Templates** - Now available from the toolbar, select to access Maintain Frequent Task Templates.
- **Out of office** - Now available from the toolbar, select to set up an out of office message.

- **Practice Settings** - Now available from the toolbar, select to set your practice opening times.

- **Options** - Now available from the toolbar, select to access **Daybook Options**. See *Daybook Option Changes* (page 7) for details.

- **Archive View** - Now available from the toolbar, select to access archived tasks.

- **Archive** - Now available from the toolbar, select to run an archive.
Daybook Option Changes

Startup and Alert Tab

The following changes have been made to the Startup and alert tab:

- **Initial Tab** replaces **On startup show the window**.
- **On startup, select first outstanding task due for today** replaces **On startup go to today**.
- **Refresh tasks and announcements every**: replaces **Check for new tasks every**: and is now in seconds not minutes.
- **On New Tasks**: has been removed.
- **Display alerts for**: replaces **Display balloon tips for**:
- **Only show when minimised** replaces **Only show alerts when minimised**.
Lists Tab

The following changes have been made to the Lists tab:

- Read Pane has been removed, the reading pane now defaults to the bottom of the screen due to the Announcement and Notification pane placings. You can drag and drop the Reading Pane to your preferred position and Daybook will remember the change and displays it in that position for you until and unless you move it again. See Moving Panes Within Daybook (page 10) for further details.

Tasks Tab

The Tasks tab has been added.

- When issuing a new task:
  - Warn me, if I do not provide any comments.
- When I mark a task as complete:
  - Display box to provide comments.
  - Unless I've added an item to a patient's medical history (when completing).
  - Default to sending a 'Task Completed' notification to issuer.
- **Warn me, if I don't provide any comments** - Select to prevent yourself from sending tasks with no comments.

- **When I mark a task as complete:**
  - **Display box to provide comments** - Select to automatically display a comments box when you complete a task, this can be a useful option for audit purposes.
  - **Unless I've added an item to a patients medical history (when completing)** - If you have selected the "Display box to provide comments" option, you can select this option if a medical history entry has been automatically made, as an additional comment should not be necessary for audit purposes.
  - **Default to sending a 'Task Completed' notification to issuer** - Select to send a completion notification to the originator of a task each time you complete a task.

**View Tab**

**View** - This option allows you to:

- **Lock** the settings of your Daybook screen. See *Moving Panes Within Daybook* (page 10) for details.
- **Reset** your screens to the system default layout.
- **Switch to traditional menu and toolbar** view.

![View tab image]
Moving Panes Within Daybook

To move the panes within Daybook:

1. Click and drag the pane you wish to move
2. Compass type arrows appear in the middle and at the edges of the screen.

3. Drop the pane you want to move on to the arrow displaying the position you require.
4. Repeat the moving process until the screen is displayed the way you require.
5. Click **Lock** to save the screen.
6. If you have locked the current layout the **Lock** button is displayed in gold.
Launch Tab

**Launch** - You can launch any of the following Vision modules from this option without leaving Daybook:

- Consultation Manager
- Appointments
- Mail Manager

There is full access to your task tabs and the tasks displayed on them from the **Launch** tab.

*Note* - Consultation Manager and Appointments open without a patient selected when launched from here.
Traditional Menu and Toolbar View

The following general changes have been made to the traditional menu and toolbar Daybook screen:

- **New Task** (F2) and **New Announcement** (Ctrl + F3) replace Add New Task.
- **Open** (Ctrl + O) replaces Open Item.
- **Edit** (Ctrl + E) replaces Edit Item.
- **Accept** (F4) replaces Register Interest.
- **Decline** (F5) replaces Decline the Task.
- **Complete** (F7) replaces Complete.
- **Reject** (F6) replaces Return to Sender.
- **New appointment** (F8) replaces Make appointment.
- **Filter** replaces Search.
- On the **Tasks for Patient** tab, Select patients replaces.
- **Add Comment** (Ctrl + W) has been added to the File pull down menu.
- Three of the task tabs have been renamed:
  - **To-do**, previously To-Do List
  - **Tasks I've Issued**, previously My Sent Tasks
  - **Tasks I've Actioned**, previously My Actioned Tasks
- A new task tab has been added:
  - **Announcements I've Sent** - This task tab displays all unarchived Announcements you have sent.

**Task tabs**

- **Notifications** and **Announcements** have been split into separate sections
  - **Notifications** - Displays confirmations of tasks you have allocated to other members of staff or groups.
  - **Announcements** - Displays all Announcements you are included on
- **Issued On** - The column within all task tabs which displays the date a task has been issued has been renamed.
Task Changes

The following changes have been made to Tasks:

Creating a Task

The following changes have been made to creating a task:

- The Add New Task screen has been renamed **Issuing New Task** and updated:

  - Based upon template (optional) - was Template - Click on the down arrow to select from your Frequent Task list. You can now use the Add / Remove option to access the Maintain frequent task templates screen from here (for further changes within adding or removing tasks from
Based upon template: Clinical Meeting

Description: Home Visit Required

Issued by: Me

Frequent task template list

- **Issued by** - This new option enables you to select who the new task is sent from, it defaults to Me, but you can select from a group you are a member of:

  ```
  Issued by: Me
  ```

- **On completion, add to medical history** - Select to add a Read coded medical history entry to the patients record once the task has been completed. Only visible if the task is linked to a patient.

- **Due** - Defaults to today, update as necessary. If a task is created with a due date of a practice closed date (see Practice Settings for further details on setting up opening times), Daybook now automatically updates Due to the next working day.

- **No priority escalation** or **Escalate priority if not completed by** - This new option enables you to automatically raise the priority of a task should it not be completed by the date specified.

- **To** - Select the recipient(s) of the Task by entering the first one or two letters of their name or by clicking Choose and selecting from the list presented.

- **Comments** replaces Text.

- The tab key order for **Issuing New Task** has been updated to:
  - Based upon template
  - More
  - Description
  - Issued by
  - Attached to patient
  - Change Patient
  - On completion, add to medical history
  - Change Read-code
  - Notify me, when task is complete
  - Due
  - Priority
  - Priority escalation
  - To
Deleting a Task

- You can only delete a task that you have created.
- The confirmation for the deletion of a task has been updated to read "Are you sure you wish to delete selected task?" with the following options:
  - **Yes** - Select to delete the task.
  - **No** - Select to close the window without deleting the task.
- The issue with selecting **Delete** from the tool bar has been addressed and it now works in the same way as selecting **Delete** from the right click menu.

Accepting and Declining a Task

**Accepting a Task**

The following changes have been made to accepting a task that has been allocated to more than one member of staff:

- **Accept** - The icon has been updated.
- The text on **Accept Task** has been updated to read:

  - "I shall deal with this task, assign it exclusively to me" in order to remove it from other staff members **To-do** screen.
  - "Do not change assignment, but indicate to others I am working on the task" to express an interest in the task.
Declining a Task

The following changes have been made to declining a task that has been allocated to more than one member of staff: Once you open a task allocated to more than one member of staff and select Decline:

- **Decline** - The icon has been updated.
- The text on Decline Task has been updated to read:

  ![Decline Task Window](image)

  **Decline Task**

  - "In will not deal with this task, remove it from my To-do list" in order to remove it from your list
  - "I am unlikely to deal with this task, but will continue to monitor it (leave in my To-do list)" to decline to action the task but to retain it on your To-do list
Task Right Click Menu Changes

The task right click menu has been updated as follows:

<table>
<thead>
<tr>
<th>Option</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Ctrl+O</td>
</tr>
<tr>
<td>Add Comment</td>
<td>Ctrl+H+W</td>
</tr>
<tr>
<td>Edit</td>
<td>Ctrl+H+F</td>
</tr>
<tr>
<td>View tasks for patient</td>
<td></td>
</tr>
<tr>
<td>Mark as unread</td>
<td></td>
</tr>
<tr>
<td>Accept</td>
<td>F1</td>
</tr>
<tr>
<td>Decline</td>
<td>F5</td>
</tr>
<tr>
<td>Reject</td>
<td>F6</td>
</tr>
<tr>
<td>Complete</td>
<td>F7</td>
</tr>
<tr>
<td>Green Category</td>
<td></td>
</tr>
<tr>
<td>Blue Category</td>
<td></td>
</tr>
<tr>
<td>Yellow Category</td>
<td></td>
</tr>
<tr>
<td>Red Category</td>
<td></td>
</tr>
<tr>
<td>Black Category</td>
<td></td>
</tr>
<tr>
<td>Uncategorised</td>
<td></td>
</tr>
</tbody>
</table>

Right click menu from an outstanding task

- **Add Comment** - Select to add free text comments to a task

Add Comment

- **Accept** - To accept responsibility for a task. This replaces Express Interest. For details see *Accepting and Declining a Task* (page 17).
- **Decline** - To refuse responsibility for a task. This replaces Decline Task. For details see *Accepting and Declining a Task* (page 17).
Task Template Changes

The following changes have been made to task templates:

Adding a Task Template

![Add Task Template](image)

- Descriptions of how to complete the template
- Default Date no longer completes automatically
- Priority is escalated if the task is not completed by the date entered
- Recipient(s) can be selected by using initial letter
- Initial text is retained for the Template

Add Task Template
• There are instructions for reference purposes on the **Add Task Template** screen when setting up a Template.

• **Default due date** - This needs to be completed manually using the standard Vision method (where n = number):
  - (n)d for number of days
  - (n)w for number of weeks
  - (n)m for number of months

• **Escalate if not completed after** - Check to set the priority of a task to increase if not completed by the date offset entered.

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

  ![Default recipients](image)

  *Default recipients with staff initial letter entered*

  • **Initial comments** is now retained for all tasks created from the task template.

**Deleting a Task Template**

• **Delete** replaces Remove within Maintain Task Templates.
The confirmation for the removing of a Task Template has been updated to read "Are you sure you wish to delete selected task template?" with the following options:

- **Yes** - Select to delete the task template.
- **No** - Select to close the window without deleting the task template.

"Are you sure you wish to delete selected task template?" confirmation
Announcement Changes

Announcements have been updated as follows:

- **Sending new Announcement** replaces the Add an Announcement screen:

  ![Sending new announcement](image)

  *Example of a completed Sending new announcement*

  - **Description** - The cursor now defaults to Description.
  - **Effective from** - Now completes with today's date by default, change if required.
  - **Expires** - Defaults to does not expire. To add an expiry date place a tick in the **Expires** check box, the date defaults to today, change as required.
  - **Comments** - The new name for Text.
The right click menu from an announcement has also been updated:

![Right click menu from an outstanding announcement](image)

- **Add comment** - Enter free text here as required. This only appears as an option if you are the one that created the Announcement.

![Add Comment dialog box](image)

- **Edit** - An edit option is now available from the right mouse menu if you created the announcement.
- **Remove from list** - This replaces the Hide option. Remove from list does not affect any other staff member viewing the announcement and deletes the announcement from your screen alone.
Notifications

There is a new section within the Daybook screen that displays messages that Daybook creates itself, these are known as Notifications. These messages consist of:

- Completion notifications.

<table>
<thead>
<tr>
<th>Type</th>
<th>Received</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task completed</td>
<td>18/12/2013 13:15</td>
<td>order medical items</td>
</tr>
</tbody>
</table>

**Example Notification**

Notifications can only be processed in two ways, to see the options right click on a Notification and select from the list displayed:

- **Show task in sent list** - This takes you to the original task you sent and is used for tasks you have initiated and that are overdue.
- **Delete** - this option deletes the notification
General Changes

The following general changes have been made to Daybook:

- Icons for modules recently updated throughout Vision have now been updated within Daybook.

- When making an appointment for a patient from Daybook the **Slot Type** and the **Book Owner**, labeled With, are now displayed.

- If you select to remove an Out of office entry the following "Selected entries will be removed. Are you sure?" message is displayed:

  ![Out of Office Settings](image)

  *Out of office - Selected entries will be removed message*
The following is a list of issues we have identified and addressed:

- When you express an interest on a low priority task the blue pin symbol, that blocked the priority of a task, has been removed.

- The issue with editing **Archive Items older than** has been addressed and the number of days can now be set for more than one calendar day. Remember tasks must have been completed at least 10 days ago in order to be eligible for archiving.

- The inconsistencies between the options available on the toolbar and those available when you right click on a task, have been resolved.

- The inconsistencies in the name of the Out of Office functionality have been addressed, it is now referred to as Out of Office throughout Vision.

- The issues with a task that triggers a Read coded Med 3 **Add Medical History** entry have been resolved.

- When a task is completed the issue with all the tasks dates being updated has been addressed, only the completion date is updated.

- When you complete a task that was not assigned to you or created by you, it now displays in your Tasks I've Actioned list and is removed from the To-Do list of the original recipient.

- When you create a task, assign it to both yourself and a group, and then complete the task yourself, the task is now displayed correctly.

- When creating a task, if you select one template and then change your mind and select another, the **To:** list is now updated to match the new template selected.

- **Maintain Task Template scroll bar** - From Daybook - Home - Task Templates, where there are too many templates to display on one **Maintain Task Templates** screen, the scroll bar now works as it should.

- **Archiving** - Only tasks that have been processed and are currently Complete are archived as part of the automatic archive facility.
- The warning that is displayed when a task is opened for editing and left open for xx minutes with no interaction has been removed.
- If you try to open a task that another member of staff has already opened, a *This task is currently locked by n* (where (n) is the member of staff that has the task open) is displayed. The task is un-editable until the other member of staff closes it.

![Task Locked Image]

- Newly created staff groups now appear in the *Show tasks assigned to:* list within the To-Do tab and all groups now display correctly.
- When you utilise *Filter*, from any of the task tabs, the list returned is no longer cleared by selecting and then deselecting one of the tasks displayed.
- Sent completed tasks are now displaying the *To:* information correctly.
- The inconsistencies between *right click - Open* and double clicking to open a task have been addressed, either option now records a task as read.
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