



Task Tracker

Introduction

The task tracker has been developed to help practice staff have a good understanding of what task needs doing when, by whom and importantly how.

We have tried to make it an easy and effective tool which can be used across all 86 Pinnacle practices by giving the practice the ability to set the task tracker up how they see fit and by doing so insuring that it works for everyone's unique practice model.

Once set up, practices will have the ability to log in and see all task that need to be completed in the clinic in a year, who is responsible for completing the task (nurses/admin/practice manager/clinical lead etc.), when the task needs to be completed (weekly, monthly, annually, quarterly etc.), alerting you that the task is overdue when not done and lastly how the task is to be completed with the ability to link into either a third party site or into your clinics procedure manual.

Drawing from my own practice management experience and then going and having a chat with other practice managers, the overwhelming theme that came through was;

“We don't know what we don't know”

Coming into Primary Care as a new practice manager or a new staff member and getting your head around what needs doing, when and by whom and how can take months and often requires a huge amount input from other staff members while you find your feet. The task tracker will enable new staff members to work through each task by themselves as part of their induction period.

As an existing practice manager trying to keep on top of all the tasks ensuring nothing is getting missed is a concern that the task tracker has now eliminated.

Hoping you find it just as helpful!

Candice Finer

Practice Manager

On the left-hand side, you will see a list of all the tasks, a tick box to tick once you have completed the task, who is responsible for the task (dept.) and its frequency.

(A step by step guide on how to complete the task is discussed later)

Refresh

Tasks completed by: (please select)

Submit Selected Save and Close

| Task | Completed today? | Responsible | Frequency |
|-------------------------------------|--------------------------|-------------|-----------|
| Recalls | <input type="checkbox"/> | Reception | Daily |
| Clear Emails | <input type="checkbox"/> | Reception | Daily |
| Fairfield Admin Tasks | <input type="checkbox"/> | Reception | Daily |
| Action Tray | <input type="checkbox"/> | Reception | Daily |
| Scanning | <input type="checkbox"/> | Reception | Daily |
| Fairfield Admin Inbox (portal help) | <input type="checkbox"/> | Reception | Daily |
| New Enrolments | <input type="checkbox"/> | Reception | Daily |
| Importing Notes | <input type="checkbox"/> | Reception | Daily |
| Close Reception | <input type="checkbox"/> | Reception | Daily |
| HUHC/CSC Update + Validate | <input type="checkbox"/> | Reception | Weekly |
| Unsynced NHI check | <input type="checkbox"/> | Reception | Weekly |
| Address Validate (funding) | <input type="checkbox"/> | Reception | Weekly |
| HUHC folder | <input type="checkbox"/> | Reception | Weekly |

Show Tasks For Attention

Show Tasks for Selected Role

Show All Tasks

Due Overdue

Help Task Instructions



| | Tuesday 24 Sep | Wednesday 25 Sep | Thursday 26 Sep | Friday 27 Sep | Monday 30 Sep | Tuesday 1 Oct | Wednesday 2 Oct | Thursday 3 Oct | Friday 4 Oct | Monday 7 Oct | Tuesday 8 Oct | Wednesday 9 Oct | Thursday 10 Oct |
|--|----------------|------------------|-----------------|---------------|---------------|---------------|-----------------|----------------|--------------|--------------|---------------|-----------------|-----------------|
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

Show task for attention = Will sort the task list to display task only due in the next two weeks

Show Task for selected roll = You can sort the task list by role by using the drop-down arrow and selecting the appropriate role. This will show all tasks for the reception team for example and remove all tasks from view that relate to anyone else.

Show All Tasks = will reset the task list to display all tasks.

The help button will take you to another page which is where the task tracker manual is kept.

Due
 Overdue

| Tuesday 24 Sep | Wednesday 25 Sep | Thursday 26 Sep | Friday 27 Sep | Monday 30 Sep | Tuesday 1 Oct | Wednesday 2 Oct | Thursday 3 Oct | Friday 4 Oct | Monday 7 Oct | Tuesday 8 Oct | Wednesday 9 Oct | Thu 10 |
|-------------------|---------------------|--------------------|------------------|------------------|------------------|--------------------|-------------------|-----------------|-----------------|------------------|--------------------|-----------|
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

The Task Instruction button will take you to another page where all the task and the links to your specific procedure manual and third-party sites will be available.

Due
 Overdue

| Friday 20 Sep | Tuesday 24 Sep | Wednesday 25 Sep | Thursday 26 Sep | Friday 27 Sep | Monday 30 Sep | Tuesday 1 Oct | Wednesday 2 Oct | Thursday 3 Oct | Friday 4 Oct | Monday 7 Oct | Tuesday 8 Oct | Wednesday 9 Oct | Thu 10 |
|------------------|-------------------|---------------------|--------------------|------------------|------------------|------------------|--------------------|-------------------|-----------------|-----------------|------------------|--------------------|-----------|
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

It looks like this:

Practice Managers to provide task instructions here

| | | |
|---------|-------------------------------------|---|
| Task 1 | Recalls | Recall Protocol and Procedure 23.docx |
| Task 2 | Clear Emails | |
| Task 3 | Fairfield Admin Tasks | |
| Task 4 | Action Tray | action tray.docx |
| Task 5 | Scanning | Scanning.pdf |
| Task 6 | Fairfield Admin Inbox (portal help) | |
| Task 7 | New Enrolments | How to Enrol a New Patient.pdf |
| Task 8 | Importing Notes | GP2GP Transfer In Procedure.doc |
| Task 9 | Close Reception | Admin Open & Close Guide.docx |
| Task 10 | HUHC/CSC Update + Validate | CSC and HUHC update.docx |
| Task 11 | Unsynced NHI check | Unsynced NHI check.docx |
| Task 12 | Address Validate (funding) | address validation.docx |
| Task 13 | HUHC folder | HUHC Process.docx |
| Task 14 | Blue Bin Order | |
| Task 15 | Admin Roster | Reception |
| Task 16 | Petty Cash / Credit Card | PETTY CASH.docx |
| Task 17 | Seen Elsewhere | Seen Elsewhere.docx |
| Task 18 | Visa / Immigration | Visa Expiry 08.06.22.docx |
| Task 19 | Not Seen 2.5 years Funding | Not Seen in 2 years procedure.docx |
| Task 20 | B4 School Cards | b4 school procedure.docx |
| Task 21 | New Babies | How to Enrol a New Baby.docx |

Click on the link to see how to do your task or click on Back to Main to take you back to the main page

To complete the task:

Using the drop down arrow, select your name (1) from the staff list. Tick the relevant task (2). Click on the Submit Selected (3)

Tasks completed by: **1**
 (please select)

3

| Completed today? | Responsible | Frequency | Monday 23 Sep |
|--|-------------|-----------|------------------|
| 2 <input checked="" type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Daily | |
| <input type="checkbox"/> | Reception | Weekly | |
| <input type="checkbox"/> | Reception | Weekly | |

Once you have done this you will notice that the cell saying it was due (green) or overdue (red) will turn white.

IMPORTANT: ALWAYS CLICK ON "SAVE AND CLOSE" BUTTON ONCE YOU HAVE FINISHED IN THE TASK TRACKER!

Tasks completed by:
 (please select)

| Completed today? | Responsible | Frequency |
|--------------------------|-------------|-----------|
| <input type="checkbox"/> | Reception | Daily |

Frequently asked questions:

What if I tick and submit the wrong task by accident?

No worries at all, just let your lead know and they can revert the action by logging into the Practice Managers Navigation page.

What is the refresh button for?

The refresh button can be used if you suspect that the person before you did not close the tracker down using the “save and close” button. Or if the tracker has been left open for a long period and there may be the chance that someone else has completed tasks.

Can I see more than three weeks in advance?

The answer is no and yes. On the main page you cannot, that is because it would defeat the purpose of being able to sort the most relevant tasks.

If you really need to know when something is due, you can once again speak to your lead/practice manager who can access that information via the Practice Managers Navigation page.

Can you tick multiple tasks at once and then submit?

Yes you can.

What is the refresh button for?

When you have finished in the task tracker it is VERY IMPORTANT to hit the “Save and Close” button. This will ensure the tracker updates and is ready for the next person who goes into it.

If you are think this may not have happened there is a “refresh” button in the top left corner to refresh the tracker (as a last resort)

What if I notice an error on the page?

Speak to your lead/Practice Manager as they should be able to correct it on the Practice Manager Navigation page

Practice Manager Navigation Page:

Having a separate area if you like that the majority of your staff won't know how to access enables the tracker to be protected from unauthorised changes to the way you have set it up. In a large practice where you have multiple trackers in operation it seems logical that the team lead for that area is also given access to this page to make life easier.

The Practice Manager Navigation Page is where everything that is seen on the main page is set. It is a little more complicated than the main page and is “easier to break” as there is coding behind the cells to enable the task tracker to work.

Before we begin, I have a few suggestions to think about before you set up your tracker. This is dependent on your individual practice more than a “right” or “wrong” way of using the tracker.

As explained, the tracker was developed for all 86 practices in the Pinnacle group to use, some have 10 000+ patients and others have 4000. Some are rural and some are urban, some are lucky enough to have Nurse Manager/Admin Managers etc. and others only have the Practice Manager. We have kept this in mind and built it so it can be tailored to your needs.

For bigger practices it may make more sense to have a separate task tracker for each department and have the lead of that department have access to the Practice Manager Navigation page as explained above.

E.g. Have a specific “nurse” task tracker which has only the nurse's task on it and another task tracker for the receptionist to use with only their tasks on it.

You can put them all together but for bigger practices it may become a little cumbersome to control with everyone trying to get into the same file all at once.

The access to the Practice Manager Navigation Page is hidden. So, it is not obvious to your staff if that's the way you want it to be.

(Scroll across to cell BA5) which has a link that will take you to the PMNP

Practice Managers Navigation Page

Maintain Task Setup

Setting up your tasks/who is responsible for them and their frequency

Save and Close

ALWAYS Select (Save and Close) when any change have been made

This ensures that the task tracker remains setup correctly and wont inmapce other areas of the tracker. It als ensures tha the tracer opens up on the Welcome page.

NOTE: There are three buttons (marked *******) which will take you back to the main page once you have updated any changes in this area. You will need to save and exit the Main Page and then log back in to the Practice Managers Navigation Page

Maintain Task Instructions

Setting up the Task instrucion Tab displayed on the Main Page ***

Maintain Roles

Will take you to where you can maintain roles of which area is responsible for doing the task

Maintain Names

Will take you to where you can maintain staff/user names

Maintain User Help

Setting up the information that will be dispayed on the HELP tab in the main page (User Manual) ***

Practice Manager Help

Full manual on how the task tracker works

View Actual Completion Dates

Tabeled view/insight of when and who completed the task

Exit to Main

Will take you back to the Main Task Page ***

Set up the task tracker in this order:

1. Setting up your staff

| | |
|----------------|--|
| Maintain Names | Will take you to where you can maintain staff/user names |
|----------------|--|

The instructions on how to do this are on the page itself as shown below

| |
|-------------------------------------|
| Back to Practice Manager Navigation |
|-------------------------------------|

| | |
|--------------------------------|---------------------|
| Insert row above selected cell | Delete selected row |
|--------------------------------|---------------------|

| |
|----------|
| ----- |
| Candice |
| Judy |
| Jennie |
| Sue |
| Emilee |
| Ashleigh |
| Eva |
| Rita |
| Kim |
| ----- |
| |
| |
| |

IMPORTANT:

Enter staff **names** between the red dotted lines by using the button "insert row above selected cell" and "delete selected row" above to amend existing examples and insert additional rows between dotted lines as necessary.

This will automatically update the "Data insights" tab on the main page for you.

To add a name: Click on the cell below where you want the name to appear and then click on "Insert row above the selected cell" button

To remove a name: Select the name you want to remove and then click on the "delete selected row" button

Please use the buttons to insert or delete names, as this automatically updates the "Data Insights"

2. Setting up the roles

| | |
|----------------|---|
| Maintain Roles | Will take you to where you can maintain roles of which area is responsible for doing the task |
|----------------|---|

The instructions on how to do this are on the page itself as shown below

| |
|-------------------------------------|
| Back to Practice Manager Navigation |
|-------------------------------------|

| |
|------------------|
| ----- |
| Clinical GP |
| Clinical Nurse |
| Off site Admin |
| Practice Manager |
| Reception |
| ----- |
| |
| |
| |

IMPORTANT:

ONLY enter staff **roles** between the red dotted lines. Amend existing examples and insert additional rows between dotted lines as necessary.

To add or delete a row, RIGHT click on the appropriate row number to select the entire row, select insert or delete from the next window and then select entire row and OK

3. Setting up the tasks

Maintain Task Setup

Setting up your tasks/who is responsible for them and their frequency

Type your task description in the task field. (A)

| Task Name A | Responsibility | Frequency |
|--------------------|----------------|-----------|
| | | |
| | | |
| | | |
| | | |
| | | |

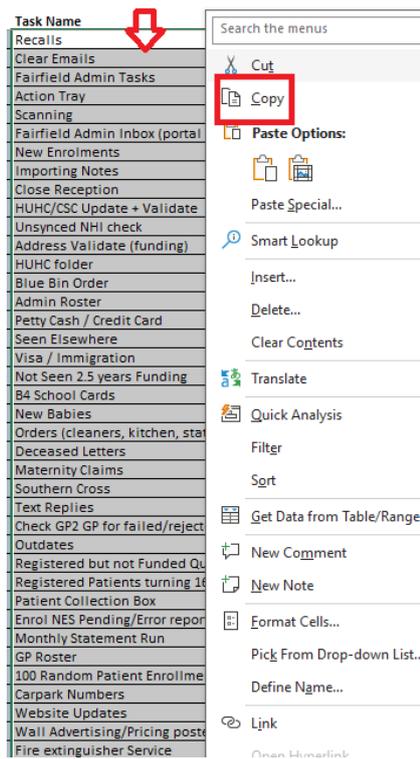
Using the drop-down arrow select who is responsible for the task (B)

| Task Name | Responsibility B | Frequency |
|-----------|-------------------------|-----------|
| | | |
| | Clinical GP | |
| | Clinical Nurse | |
| | Off site Admin | |
| | Practice Manager | |
| | Reception | |

Using the drop-down arrow select what frequency the task needs to be done at (C)

| Task Name | Responsibility | C Frequency |
|-----------|----------------|-----------------------|
| | | |
| | | Daily |
| | | Weekly |
| | | Monthly |
| | | Quarterly |
| | | Annually |

As you select the frequency you will notice that the cells corresponding to your selection will turn white allowing you to use the drop down arrows of each to make your selection. (shown in the below example of the annually selected cells)



You will need this copy of the list in the setting up the task instructions. (Step 4)

4. Setting up/Maintaining Task Instructions

Because this tab works or is linked to the tab on the main page, once you click on this button you will be automatically taken to the main page. You will then be required to save and exit and log in to the Practice Managers Navigation Page again. I suggest you make all the changes you need to make in one hit on this page to minimize the number of times you must log back in.

| | |
|---|--|
| Maintain Task Instructions | Setting up the Task instruction Tab displayed on the Main page |
| After making any changes in this screen you will be taken back to the main page | |

Place your cursor in line with Task 1 and PASTE your list copied from Step 3

(CNRTL + V) or (Right click and Paste)

Now it's time to add the links to each task. These can be linked to your procedure folder or to third party websites. This means that when the procedure is updated the task tracker will automatically be updated

**If the location of the file you have linked to moves your task tracker link will also need to be updated*

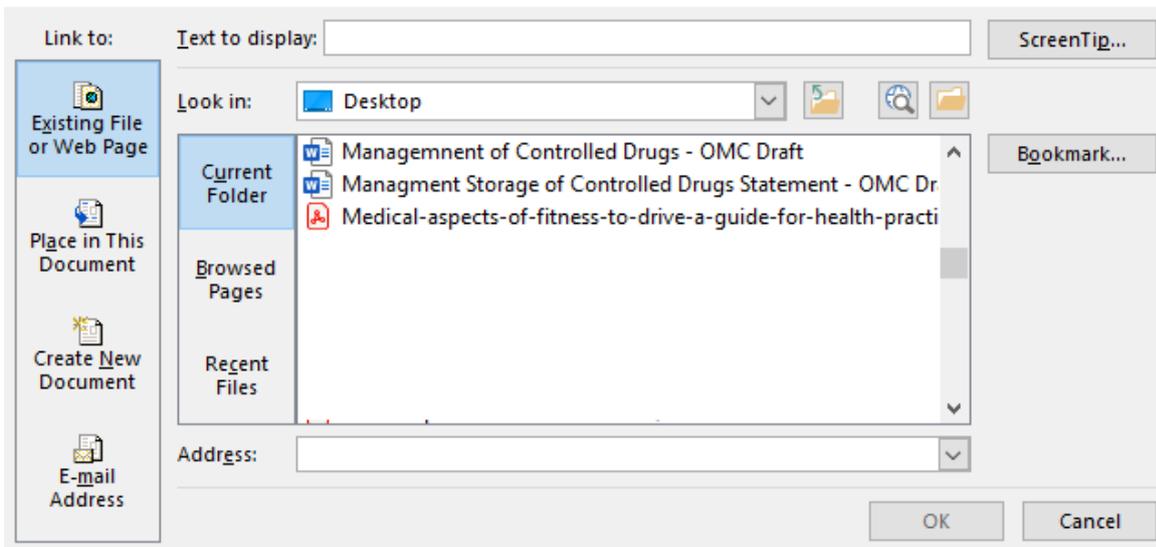
| | | |
|---------|-------------------------------------|---|
| | Back to Main Page | Practice Managers to provide links to task instructions in this column ↓ |
| Task 1 | Recalls | Recall Protocol and Procedure 23.docx |
| Task 2 | Clear Emails | |
| Task 3 | Fairfield Admin Tasks | |
| Task 4 | Action Tray | action tray.docx |
| Task 5 | Scanning | Scanning.pdf |
| Task 6 | Fairfield Admin Inbox (portal help) | |
| Task 7 | New Enrolments | How to Enrol a New Patient.pdf |
| Task 8 | Importing Notes | GP2GP Transfer In Procedure.doc |
| Task 9 | Close Reception | Admin Open & Close Guide.docx |
| Task 10 | HUHC/CSC Update + Validate | CSC and HUHC update.docx |
| Task 11 | Unsynced NHI check | Unsynced NHI check.docx |
| Task 12 | Address Validate (funding) | address validation.docx |

How to add a link:

The screenshot shows the Excel ribbon with the 'Insert' tab selected. The 'Links' option is highlighted in the ribbon. Below the ribbon, the spreadsheet shows a task tracker with a red box around the cell for 'Task 2' (Clear Emails) and a red box around the 'Links' option in the ribbon.

1. Select the cell you want the link to appear in
2. Select Insert from the the top menu
3. Select links
4. Double click on the file you want the task link too and then OK

Insert Hyperlink



Viewing the data from the submitted task completion:

This can be done in the View actual completion dates tab.



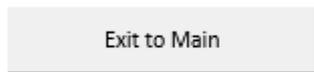
NOTE: If a task is submitted in error as being completed and you need to reverse that submission you would do it in this tab. Just delete the incorrect name and the date entry and they will appear back on the Main Page for completion again.

Eg: If Candice made an error on the 19/9 and did NOT do task 2 you can just delete both date and name.

| Task 1 | | Task 2 | | Task 3 | | Task 4 | | Task 5 | |
|-----------|---------|--------------|---------|-----------------------|---------|-------------|---------|-----------|---------|
| Recalls | Who | Clear Emails | Who | Fairfield Admin Tasks | Who | Action Tray | Who | Scanning | Who |
| 26 Aug 24 | Jennie | 18 Sep 24 | Judy | 6 May 24 | Candice | 26 Feb 24 | Bob | 26 Aug 24 | Candice |
| 26 Aug 24 | Jennie | 18 Sep 24 | Kim | 19 Sep 24 | Candice | 26 Aug 24 | Jennie | 19 Sep 24 | Candice |
| 26 Aug 24 | Candice | 19 Sep 24 | Candice | | | 19 Sep 24 | Candice | | |
| 4 Sep 24 | Candice | | | | | | | | |
| 19 Sep 24 | Candice | | | | | | | | |
| 20 Sep 24 | Candice | | | | | | | | |

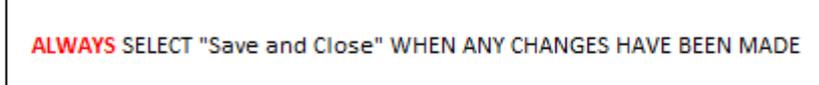
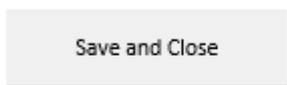
Note: entries below can be manually deleted if an error has been made (delete both date and person name)

This button will take you to the Main page so you can see that the changes you have made are as you want them. To get back into the Practice Managers Navigation page you will need to save and exit on the Main Page and log back in



It is advisable to use the Save and Close button once you have done any changes on the Practice Managers navigation page.

By selecting this you will be taken all the way out of the Task Tracker.



This ensures that the task tracker remain setup correctly and wont impact other areas of the tracker. It also ensures that the tracker opens up on the Welcome page.