



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

The task track has two distinct “user applications.”

The Main Page:

Welcome to Task Tracker



Lets Go !!

Click on the “Lets Go!!” button to get to the main page.

[illegible]

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)

Tasks completed by:

(please select)

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

Clinical GP
Clinical Nurse
Off site Admin
Practice Manager
Reception

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	Thur: 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.

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

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.

Show Tasks For Attention

Show Tasks for Selected Role


Show All Tasks

Due

Overdue

Help

Task Instructions



Clinical GP

Clinical Nurse

Off site Admin

Practice Manager

Reception

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	Thursday 10 Oct

It looks like this:

Back to Main

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**
 Candice (please select)

3 Submit Selected Save and Close

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)

Submit Selected Save and Close

Completed today?	Responsible	Frequency
<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

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	<div>Save and Close</div> <div> ALWAYS Select (Save and Close) when any change have been made </div> <div> 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. </div> <div> 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 </div>
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	Frequency C
		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)

Frequency	Day of week		Day of month		Month of year			
	Earliest Start	Latest Finish	Earliest Start	Latest Finish	Required Month	Required Month	Required Month	Required Month
Daily								
Weekly								
Monthly								
Quarterly								
Annually								
					January			
					February			
					March			
					April			
					May			
					June			
					July			
					August			
					September			
					October			
					November			
					December			

There are sadly a few limitations to your selections:

Bi- annually = You will need to load the same task twice as an annual task and then select the month for each individually. I would suggest you detail that out in your task description to make it easier. See example below.

ID	Task Name	Responsibility	Frequency	Earliest Start	Latest Finish	Earliest Start	Latest Finish	Required Month
Task 52	Example - Biannually due in January	Practice Manager	Annually					January
Task 53	Example - Biannually due in August	Practice Manager	Annually					August
Task 54								

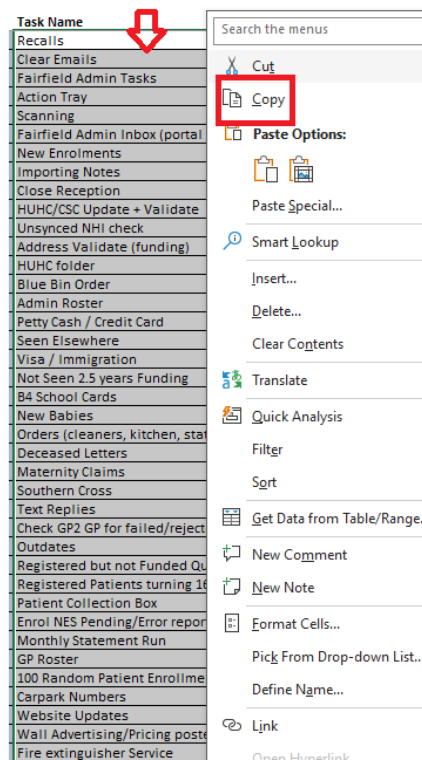
The task will appear on your task tracker, once in January and once in August.

Annually on a certain date = If you have a task that must be done on a certain date in the month eg the 20th and can't be done sooner or later then again you will need to put that in the description of your Task name to alert your team to that. See example below.

Task Name	Responsibility	Frequency	Day of week		Day of month		Required Month
			Earliest Start	Latest Finish	Earliest Start	Latest Finish	
Example - MUST BE DONE ON THE 20TH!	Practice Manager	Annually					January

Once you have set up all your task you need to copy your full list of task names only!

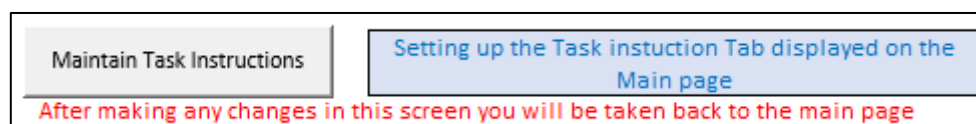
Select all your tasks by clicking on the first task name and dragging your cursor to the last task name. Then either use (CNRL + C) OR (right click and copy the entire list)



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.



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

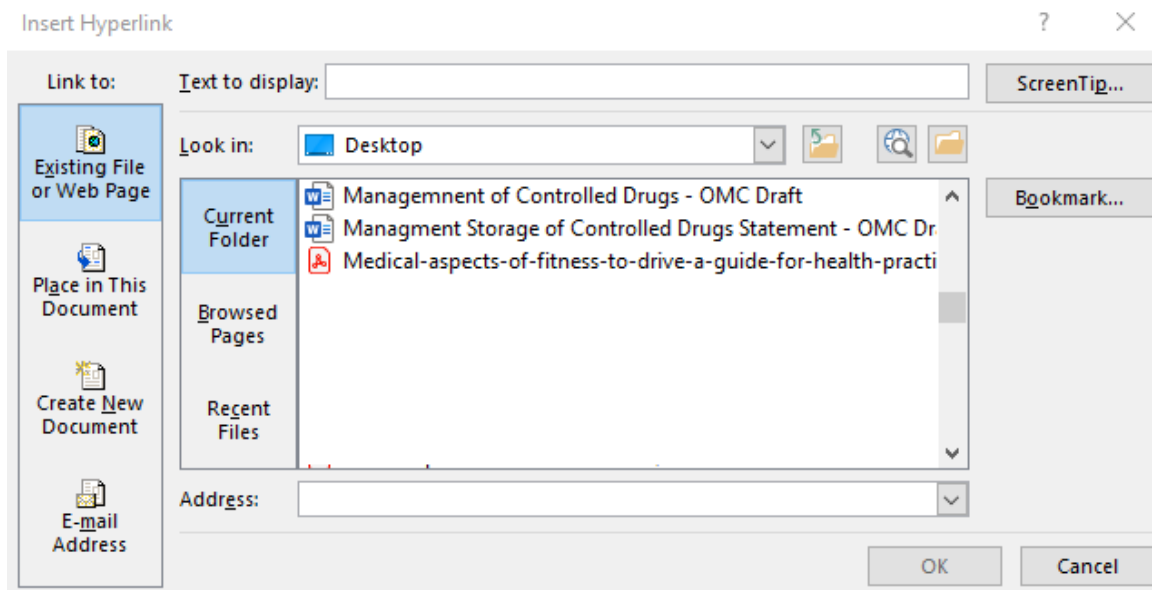
**If the location of the file you have linked to moves your task tracker link will also need to be updated*

	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:

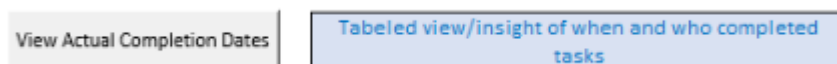
The screenshot shows the Excel ribbon with the 'Insert' tab selected. The 'Links' option is highlighted in the 'Links' group. Below the ribbon, the spreadsheet shows the task tracker table. A red box highlights the cell for Task 2, 'Clear Emails', in the third column, indicating where a link should be added.

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



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.

Back to Practice Manager Navigation		Note: entries below can be manually deleted if an error has been made (delete both date and person name)							
88		94							
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

Exit to Main

Will take you back to the Main Task Page

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.

Save and Close

ALWAYS SELECT "Save and Close" WHEN ANY CHANGES HAVE BEEN MADE

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.