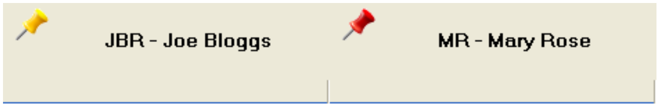
STAFF MESSAGING

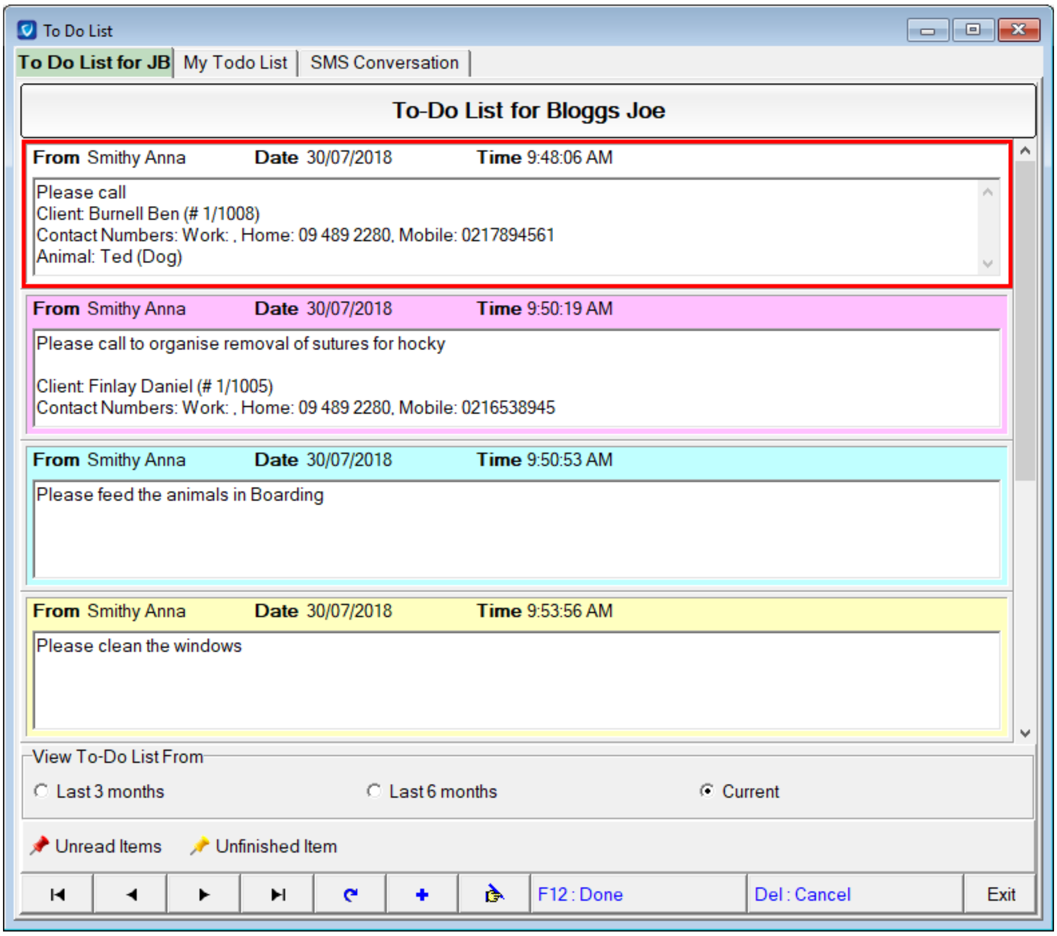
TODO LIST MESSAGING SYSTEM

The To-Do List messaging system allows you to attach messages to a staff member's column in the diary. When they have a message that has not been completed a thumbtack will appear in the top left hand corner of their column. A red thumbtack signifies at least one note has not been read, a yellow thumbtack signifies all notes have been read. Once all notes have been marked as done the thumbtack will disappear.



Each note in the To Do list is coloured for easy identification. The note that you currently have selected will have a red border.

White:	Signifies the note has not been read.
Pink:	Signifies that the note has been cancelled.
Blue:	Signifies that the note has been completed / actioned.
Yellow:	Yellow signifies the note has been read but not yet completed or actioned.



How to Add a New Message

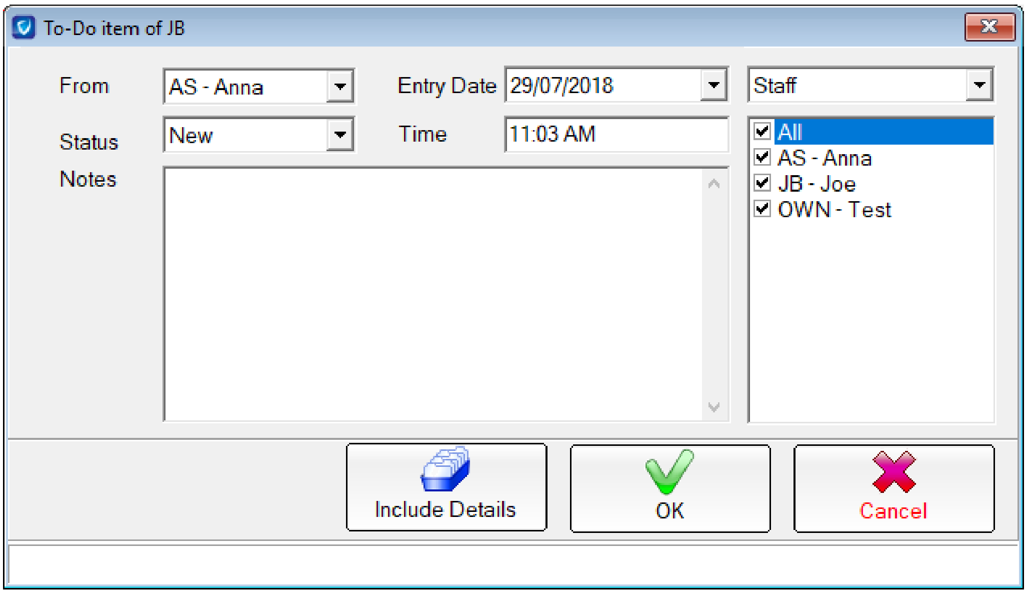
1. Click on the staff member's name or photo at the top of the diary, the To Do list will open.

2. Click on the **'+'** button at the bottom of the To-Do List page.

3. Fill in the form as required for the new To Do List Item.

    - **From:** The staff members that is creating the message
    - **Date:** The date that the note is created for.
    - **Status:** This is the status of the note
        - **New:** This is for a new note
        - **Read:** The note has been read but not yet completed.
        - **Done:** The note has been completed
        - **Cancelled:** The note has been cancelled
    - **Time:** The time the note is due for completion.
    - **Staff:** The staff you wish to send the To Do message to.

4. Click **'OK'** to save the note.



TIP: If you are leaving a note for a staff member to call a client, add the client contact details quickly by using the 'Include Details' button. You can search for a client and the name, client #, phone numbers, patient name and type will be added to the note automatically.

Staff that are not rostered on to the diary can view To Do messages by going to **Actions** | **To Do (For Any Staff)** and selecting their staff ID

How to Mark a Note as Done, Read or Cancelled

1. Click on the staff member's name or photo.

2. Select the note you wish to edit so a red border surrounds it.

3. Change the **'Status'** field to suit.
   - **New:** This is for a new note
   - **Read:** The note has been read but not yet completed.
   - **Done:** The note has been completed
   - **Cancelled:** The note has been cancelled

Note: Until a message is marked as **'Done'** or **'Cancelled'**, it will keep rolling over to the next day.

How to Add Message to All Staff

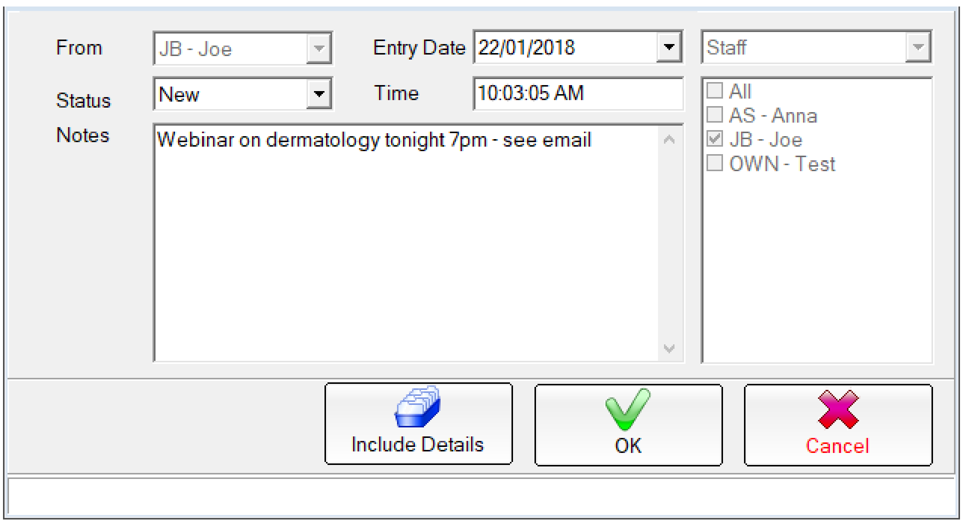
1. While the diary is open click on the Action menu at the top of VetlinkPRO

2. Select **'Send To Do for All Staff'** from the list.

3. Select Staff you wish to send message to by ticking ID's in top right hand corner.

4. Select From staff member. E.g. who is creating message.

5. Write message and click **OK** to send.

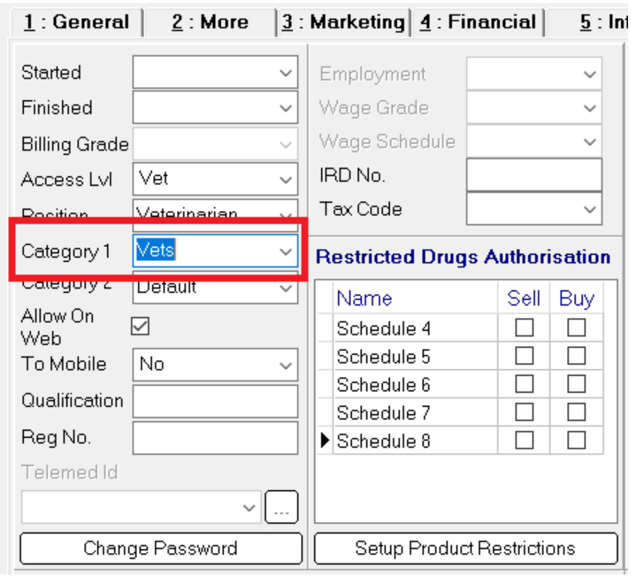


Messaging Using Staff Groups

Assigning Staff to Groups

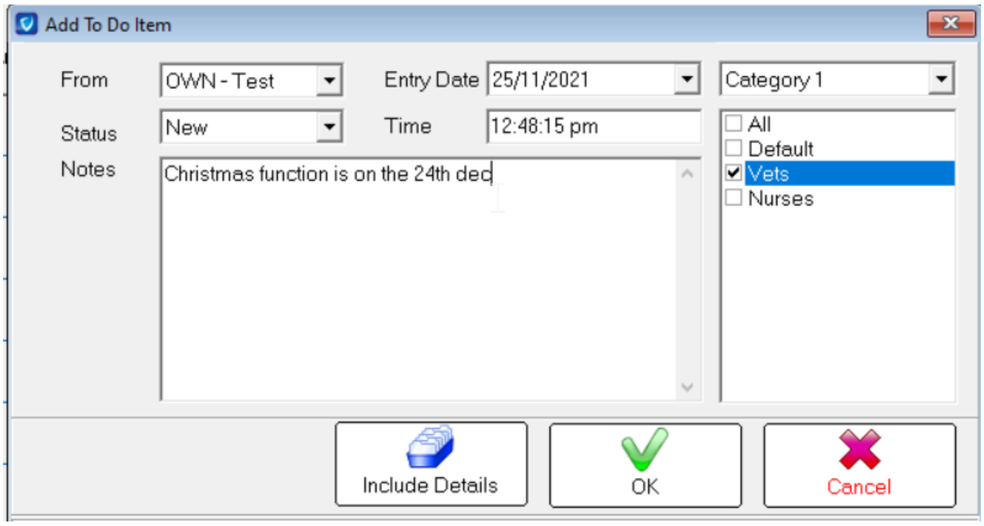
To message particular groups such as Vets, Nurses, Vet Techs etc. you can assign staff to categories. To do this;

1. Go to **Options -> Picklist -> Staff -> Category 1.**
2. Click the **+** button to add new categories.
3. Search and open a Staff record you wish to assign to a category/group
4. Once the staff record is open click the **Staff** tab.
5. Change the **Category 1** to the correct group.



Messaging to a Staff Group

1. While the diary is open click on the **Action** menu at the top of VetlinkPRO
2. Click **Todo (For Any Staff)**
3. Write the message you wish to send.
4. Change the dropdown menu at the top right to **Category 1**
5. Tick the group you wish to send to and click **OK**.



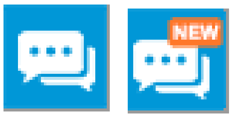
INTERSTAFF MESSAGING SYSTEM

The messaging system can be used to communicate with staff members inside the clinic quickly and efficiently. You can organise group chats and add attachments to your message.

Sending a New Message

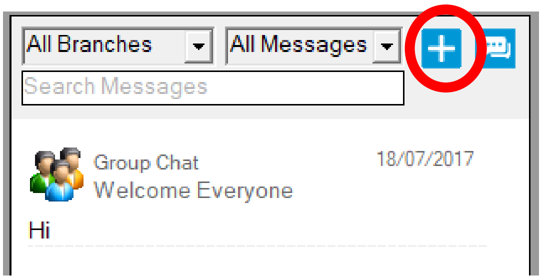
1. To send messages, you must first login by pressing the default button on the side menu or by pressing Log In/Out on the top bar.

2. Once logged in if you have a new message "New" will display on the messaging icon. The messaging icon can also be dragged up and down the side of the screen so the user can set the most appropriate place to save it.



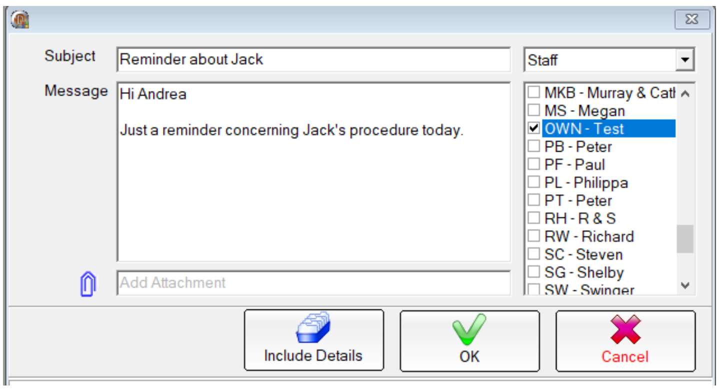
3. To create a new message click on the message icon

4. Once you click on the messaging icon the following menu will appear.

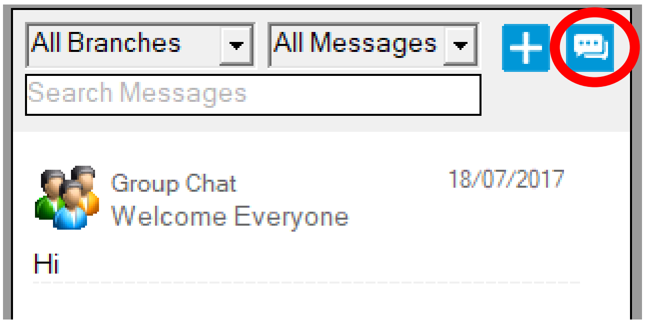


5. To send a message begin by pressing the "+" button as circled.

6. After clicking + button a new window will open.
   a. You can enter in a subject and begin typing a message.
   b. The box on the right-hand side allows you to send it to various staff members, selecting more than 1 automatically categorizes it as a "Group Chat". It also allows you to send a message to a category in bulk.
   c. This window allows you to attach files
   d. The **Include Details** button lets you look up a client / patient and include their details in the message, eg. The staff member may need to call the client back.



7. To exit out of the messaging system press the message logo as circled below.



8. If there are confidential messages it is also recommended to log out of your staff ID as well.

Viewing Messages sent to you

1. To view messages, you must first login by pressing the default button on the side menu or by pressing Log In/Out on the top bar.

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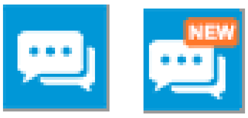
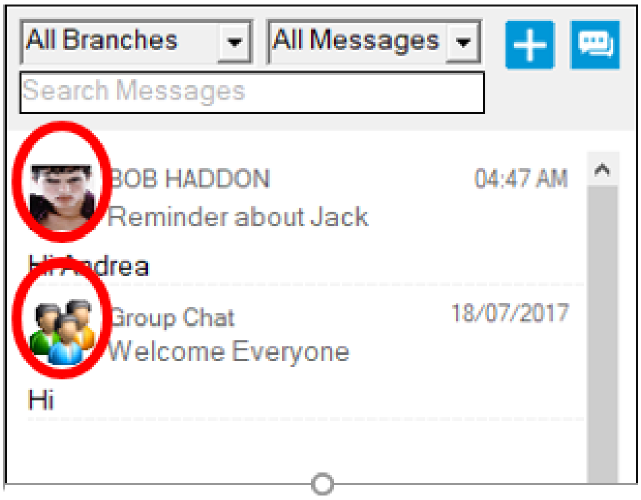
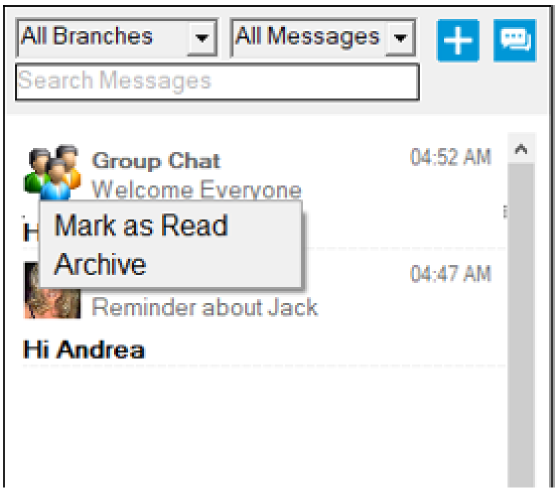


3. To view messages click on the message icon

4. Once you click on the messaging icon the following menu will appear.

5. The entries circled in red are the messages in your Inbox. Whenever a message has a heading "Group Chat" the system is letting you know that message was broadcasted to multiple staff members.





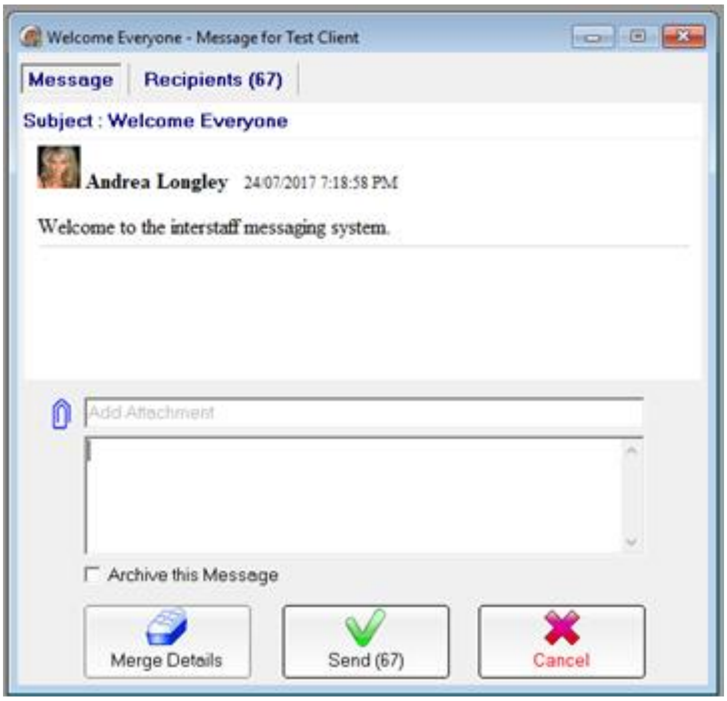
6. By right clicking on a message you can either archive it or mark it as read.

- Archive it will remove it from your inbox.
- Mark as Read will mark the message as unread, note that the interstaff messaging logo will update to notify the user that they have a new message.

7. To search for existing messages you can filter via branch/message status or keywords.

8. If you double click on a message you will be able to view and participate in the conversation.

9. Next to the “Message” tab you are able to view the recipients so you can check who you are replying to.



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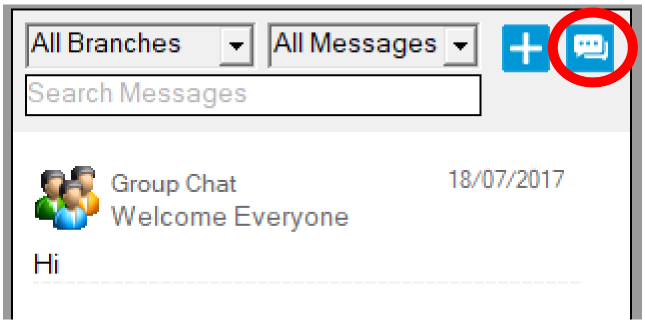

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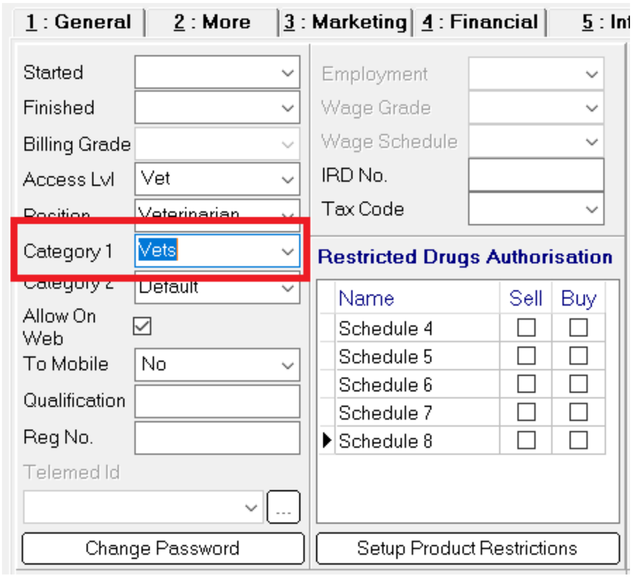

Messaging to a Staff Group

1. Click the **Messaging icon** on side of page and log in
2. Click **+** to start a new message
3. Write the message you wish to send.
4. Change the dropdown menu at the top right to **Category 1**
5. Tick the group you wish to send to and click **OK**.