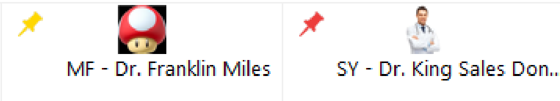
STAFF MESSAGING

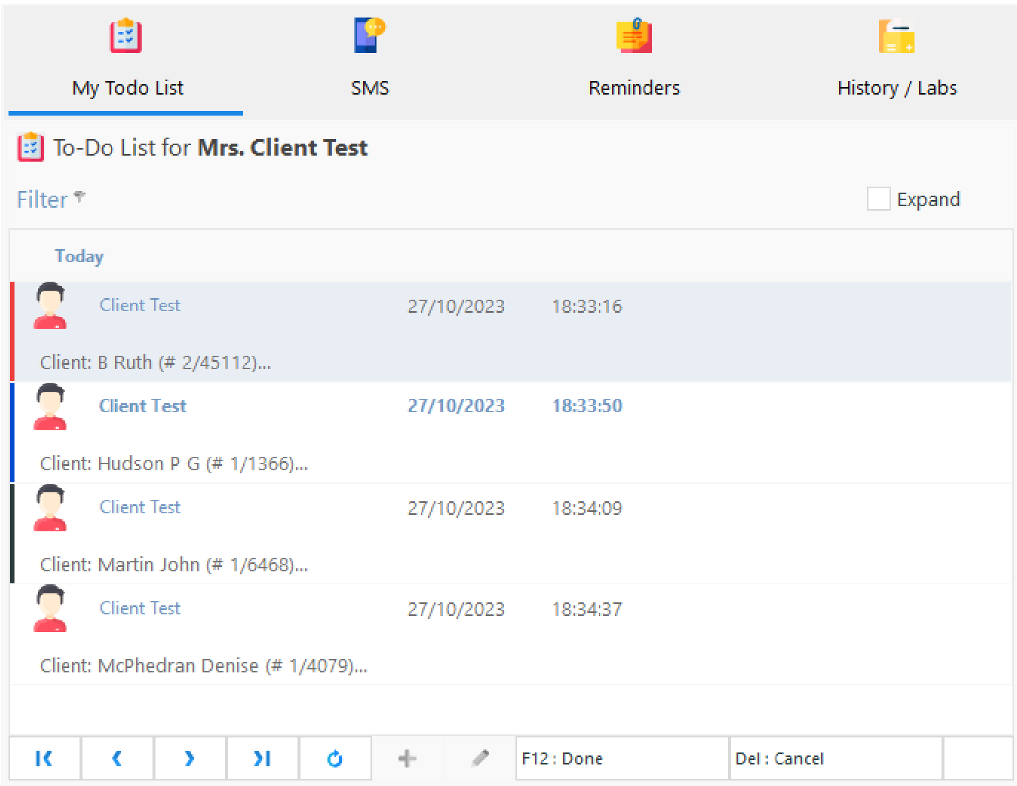
TODO LIST MESSAGING SYSTEM

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 be highlighted light blue.

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



How to Add a New Message

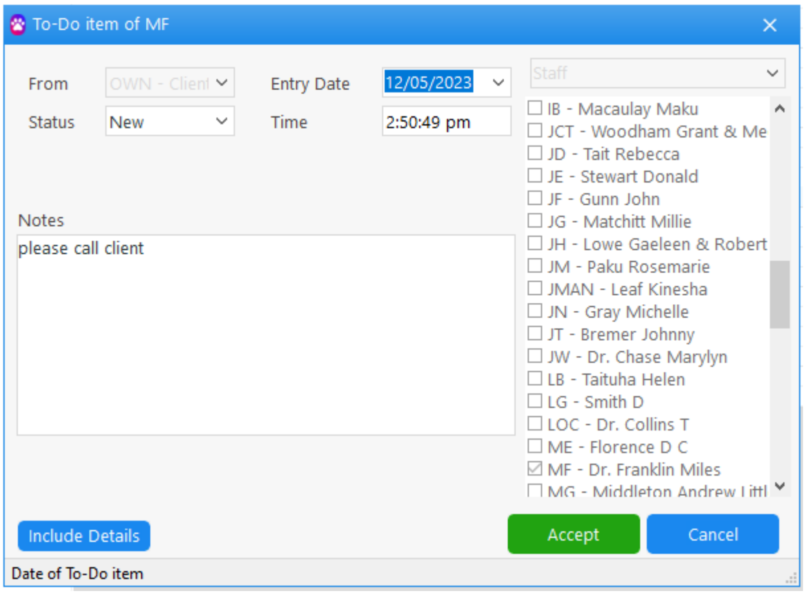
1. Click on the staff member's name or photo at the top of the diary, the To Do list will open.

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 **'Accept'** 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.

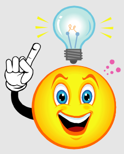
Staff that are not rostered on to the diary can view To Do messages by going to **Actions** | **To Do (For Any Staff)** and selecting their staff ID.

How to Mark a Note as Done, Read or Cancelled

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

2. Hover over the item on the To Do list. Some icons on the top right-hand side of the note will become visible.

3. Click on the appropriate icon to update the status:
    - **Eye:** This marks a note as read/unread.
    - **Tick:** This marks a note as done.
    - **X:** This marks a note as cancelled.



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

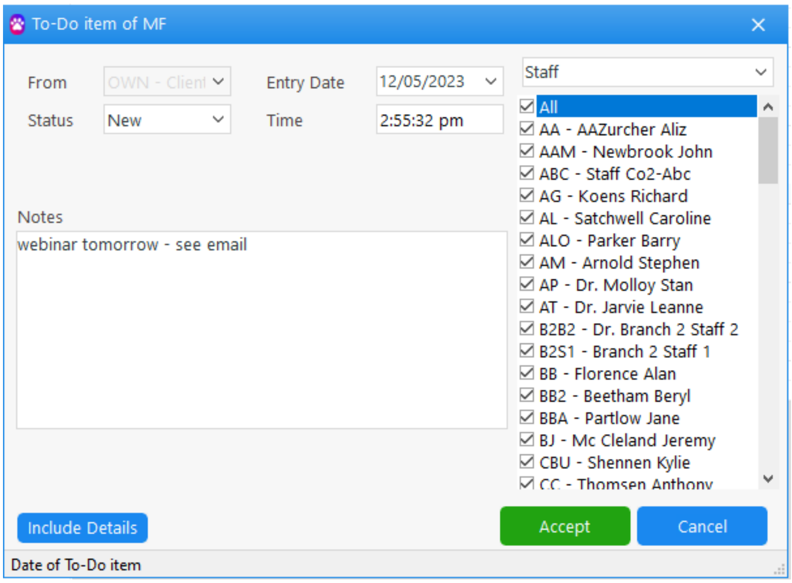
How to Add Message to All Staff

1. While the diary is open click on **Send To Do** at the top of the screen.

2. Select Staff member/s you wish to send message to by ticking ID's in top right hand corner. You can also select **All** to select all staff members.

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

4. Write message and click **Accept** to send.



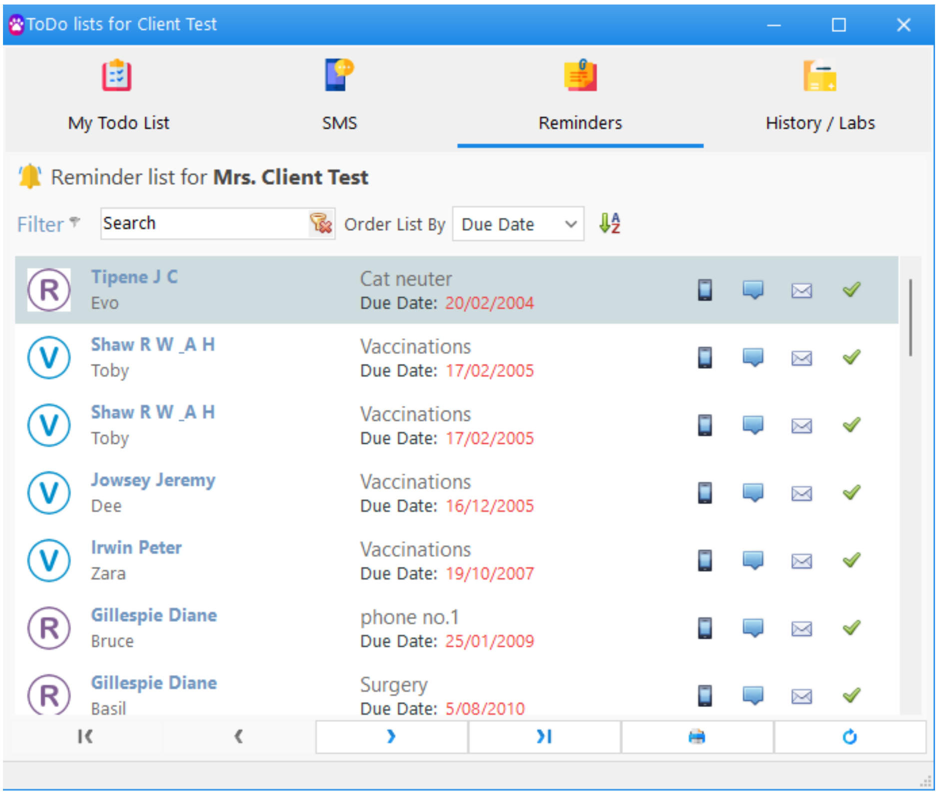
Other To Do list Options

SMS

The SMS tab in a staff's To Do list shows any message conversations with clients assigned to this staff member. The staff can also reply to any messages from this screen.

Reminders

The Reminders tab in a staff's To Do list shows any reminders assigned to this staff member. They can also view the client's phone number, send SMS or emails to the client or mark as done from this screen as well.



History / Labs

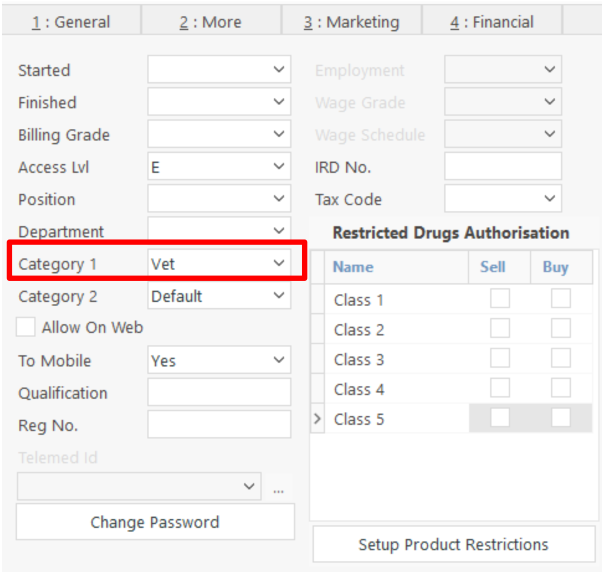
This tab shows any histories marked 'To Finish' that are associated with this staff member. Any associated Lab results that also need endorsing or viewing will also be here. You can endorse lab results from this screen aswell.

Messaging Using Staff Groups

Assigning Staff to Groups

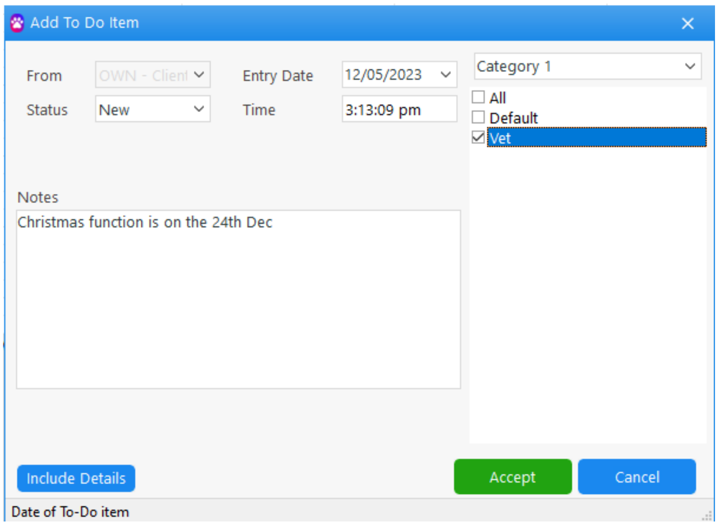
To message particular groups such as Vets, Nurses, Vet Techs etc. you can assign staff to categories. To do this:

1. Go to **Options | Picklist | Staff | Category 1.**
2. Click the **+** button to add new categories. You will need to close and open VetlinkPRO for any new categories to show.
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 **Send To Do** at the top of the screen.
2. Write the message you wish to send.
3. Change the dropdown menu at the top right to **Category 1**
4. Tick the group you wish to send to and click **Accept**.



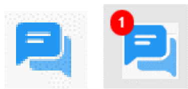
INTERSTAFF MESSAGING SYSTEM

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

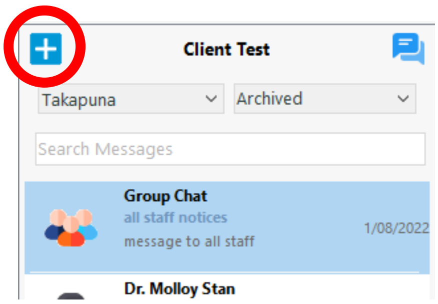
1. To send messages, you must first login by pressing the default button on the side menu or by pressing Log In/Out on the top bar.

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.



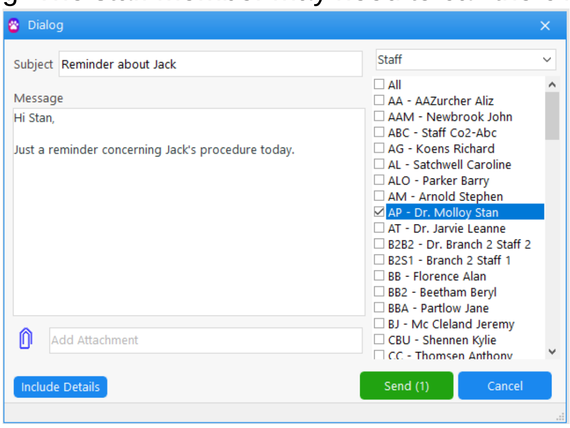
3. To create a new message, click on the message icon.

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

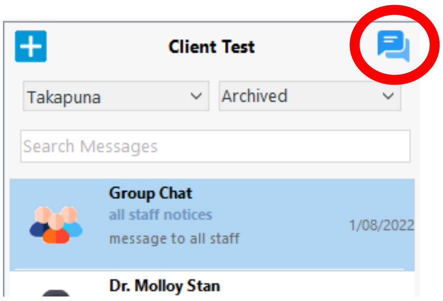


5. To send a message begin by pressing the **“+”** button as circled.

6. After clicking the **“+”** 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. You can add attachments by either clicking on the blue paperclip or the text box with ‘Add Attachments’ in it.
    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

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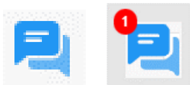
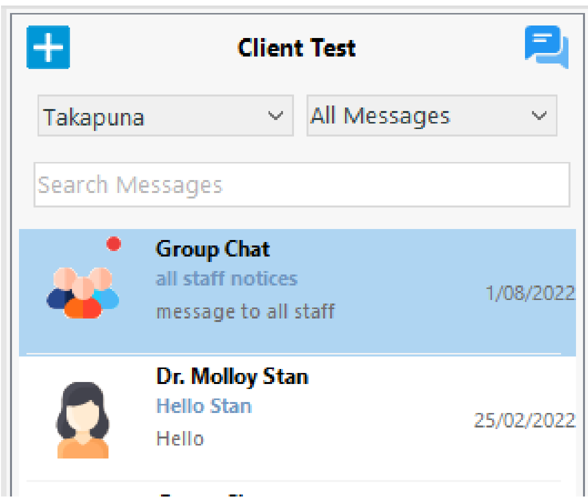
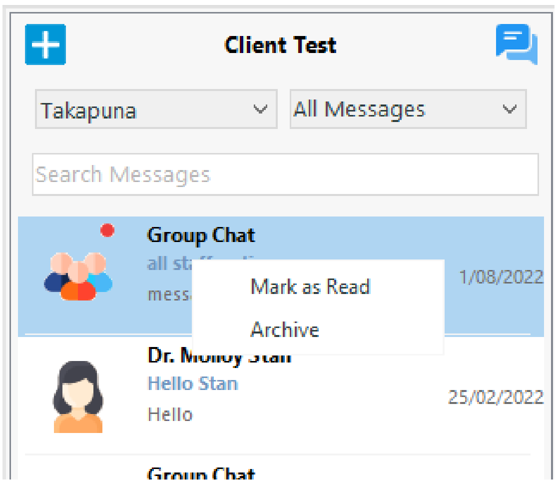


3. To view messages, click on the message icon.

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.



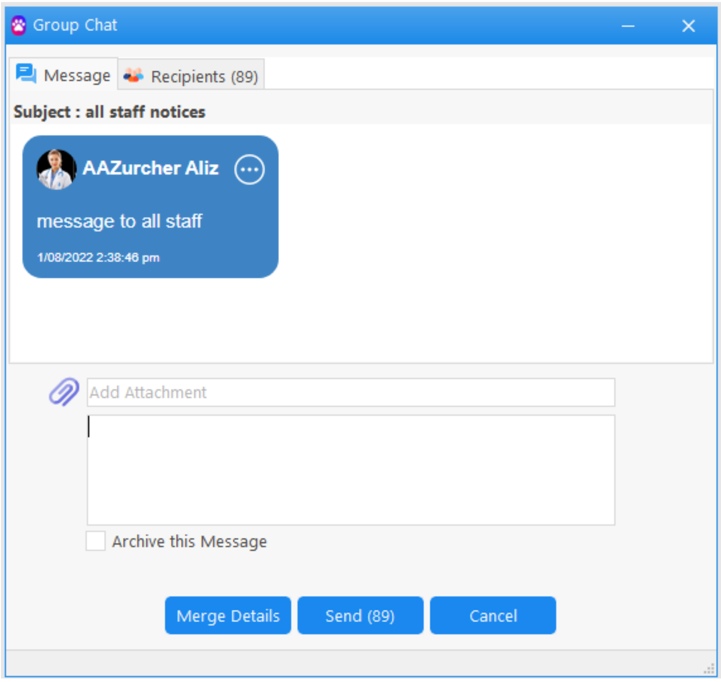


6. By right clicking on a message, you can either archive it or mark it as read.
   - **Archive** it will remove it from your inbox.
   - **Mark as Read** will mark the message as unread, note that the interstaff messaging logo will update to notify the user that they have a new message.

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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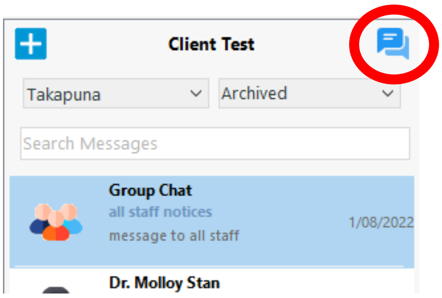

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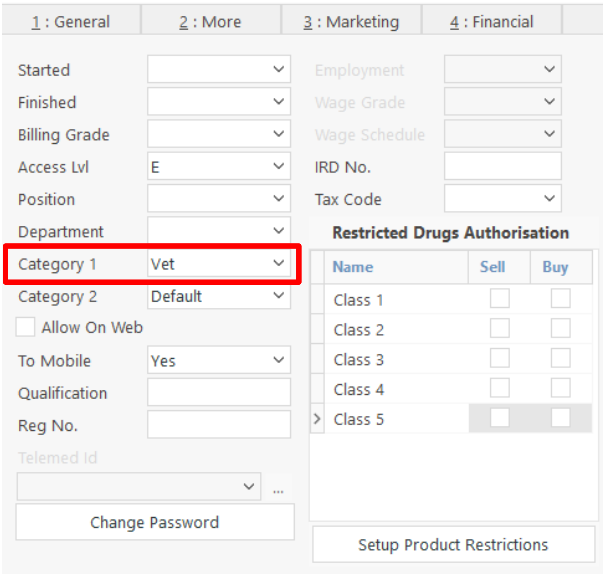

Messaging to a Staff Group

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**.