

Partners in improving local health

NECS Clinical Systems Specialist Team

EMIS Web – Creating and Viewing Tasks

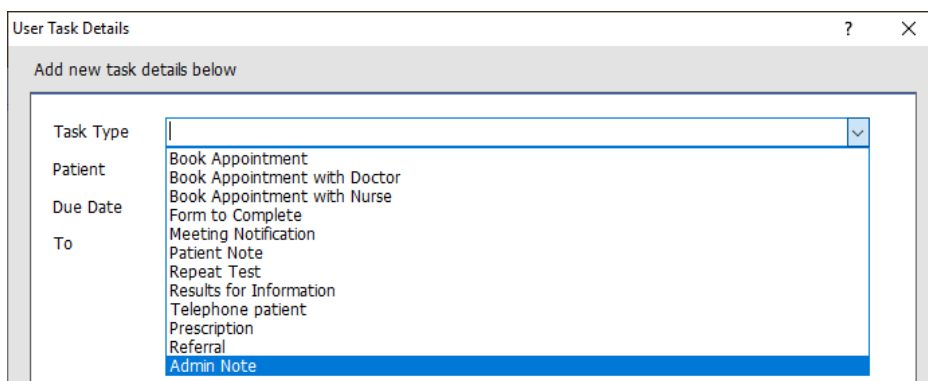
Creating a New Task

1. Click the **Add Task** from the **quick access toolbar**, alternatively click **Create Task** from consultations.

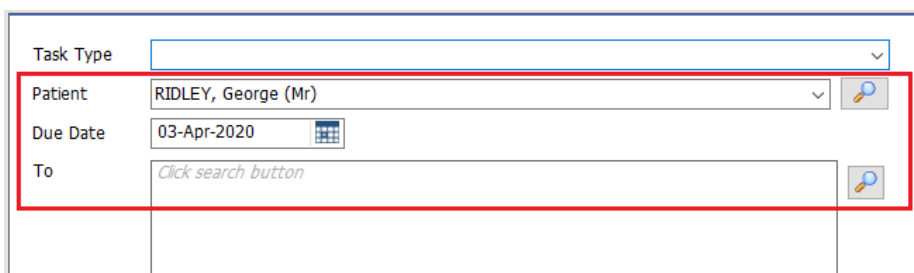


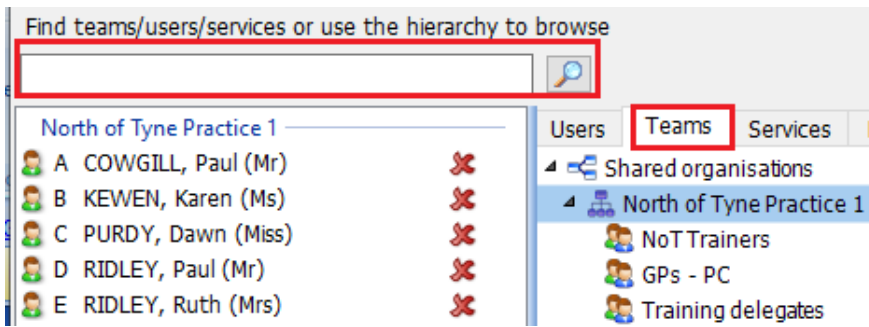
2. Add the required **Task Type**

Note: **Admin note** and **Meeting notification** are **non-patient tasks** and will not be linked to a patient record. All other tasks are linked to the selected patient, and will be visible in the **Diary** section of **Care Record**.

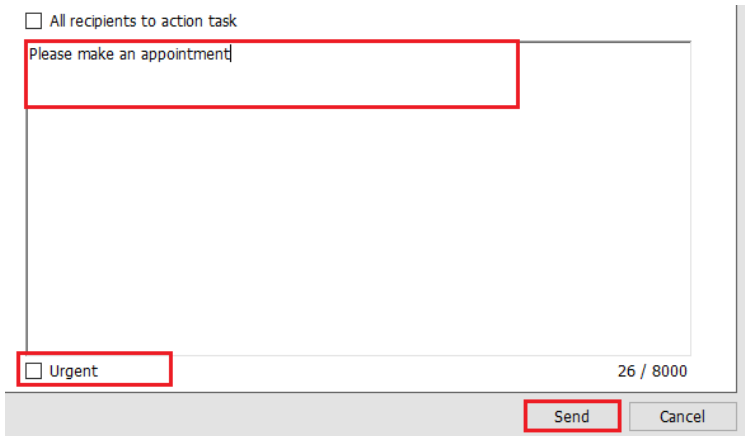
A screenshot of a 'User Task Details' dialog box. It has a title bar with a question mark and a close button. Below the title bar is a grey bar with the text 'Add new task details below'. The main area contains a list of task types: Book Appointment, Book Appointment with Doctor, Book Appointment with Nurse, Form to Complete, Meeting Notification, Patient Note, Repeat Test, Results for Information, Telephone patient, Prescription, Referral, and Admin Note. The 'Admin Note' option is highlighted in blue.

3. The patient will be populated if you have a record open, alternatively enter a subject for non-patient tasks.
4. The **Due Date** will be populated, change if necessary.
5. In the **To** box, click the **magnifying glass** and search for the user or team to send the task to. **Double Click** on required user or team and click on **OK** to select.

A screenshot of a task details form. It has a 'Task Type' dropdown menu. Below it are three rows: 'Patient' with a dropdown menu showing 'RIDLEY, George (Mr)' and a magnifying glass icon; 'Due Date' with a text box showing '03-Apr-2020' and a calendar icon; and 'To' with a text box containing the text 'Click search button' and a magnifying glass icon. A red rectangle highlights the Patient, Due Date, and To fields.



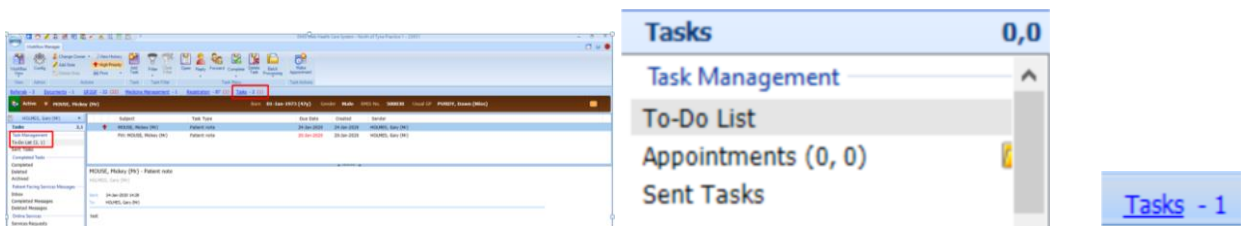
6. Enter the relevant details of the task in the **Notes** box, if necessary tick to mark as **Urgent** and tick **all recipients to action task** if all users are to read /action individually.



7. Click **Send** to send the task to the selected users or Teams.

Accessing Tasks

1. Tasks can be accessed from **Tasks Hyperlink** or from **Tasks** section of **Workflow Manager**.



Click the task to display further details in the bottom display pane.

Viewing Tasks in the Patient Record

1. Active or completed patient Tasks can be accessed from **Diary** section of **Care Record** for the selected patient.

