North of England Commissioning Support

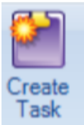
Partners in improving local health

NECS Clinical Systems Specialist Team

EMIS Web – Creating and Viewing Tasks

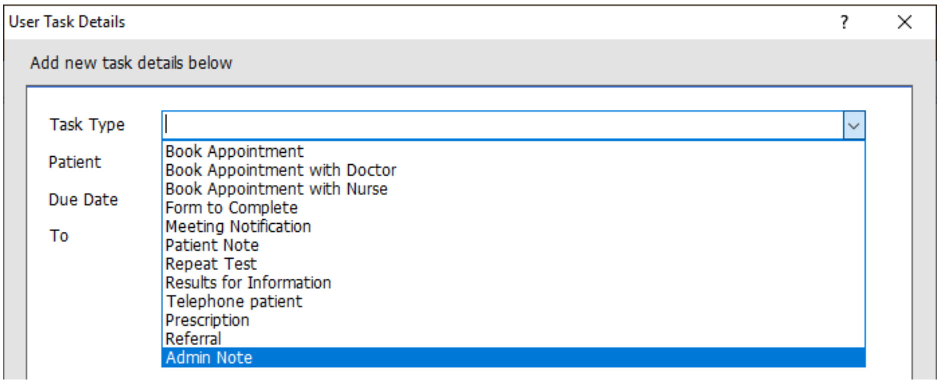
Creating a New Task

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



2. Add the required **Task Type**

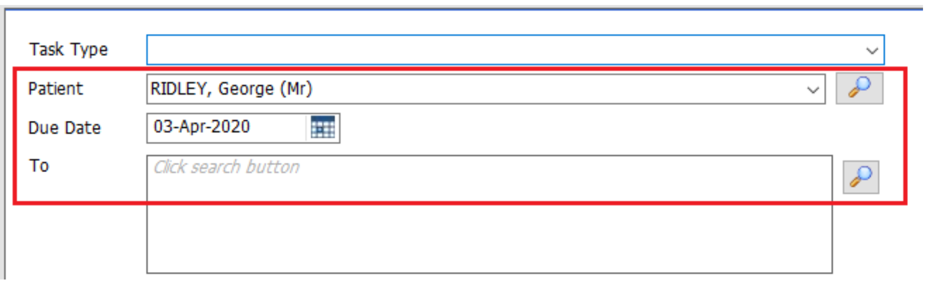
Note: Admin note and **Meeting notification** are **non-patient tasks** and will not be linked to a patient record. All other tasks are linked to the selected patient, and will be visible in the **Diary** section of **Care Record.**



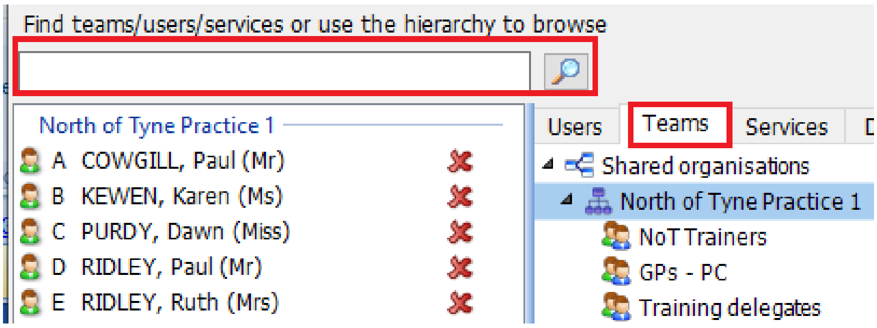
3. The patient will be populated if you have a record open, alternatively enter a subject for non-patient tasks.

4. The **Due Date** will be populated, change if necessary.

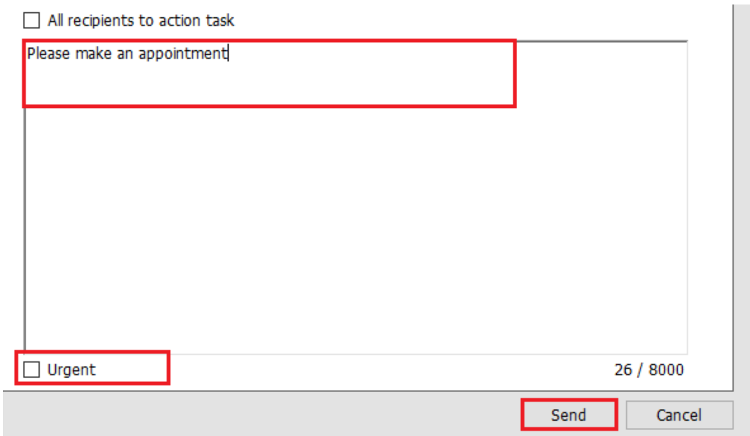
5. In the **To** box, click the **magnifying glass** and search for the user or team to send the task to. **Double Click** on required user or team and click on **OK** to select.



 Revision date: 03/04/2020



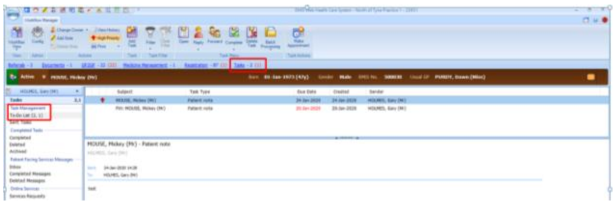
6. Enter the relevant details of the task in the **Notes** box, if necessary tick to mark as **Urgent** and tick **all recipients to action task** if all users are to read /action individually.

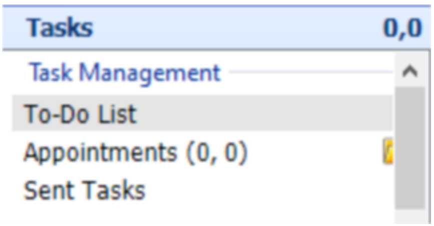


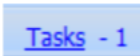
7. Click **Send** to send the task to the selected users or Teams.

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.