North of England
Commissioning Support

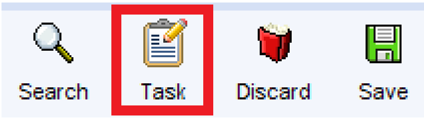
Partners in improving local health

NECS Clinical Systems Specialist Team

SystmOne – Add an Attachment to a Task

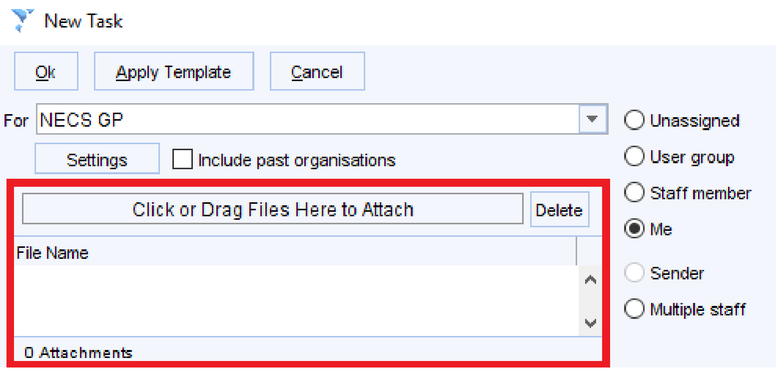
Attaching a document to a Task

1. Open the patient's record and click **New Task**

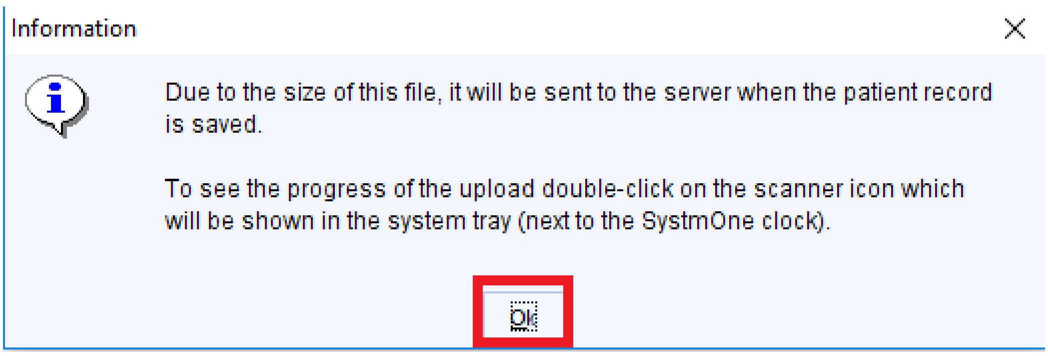


2. Within the Task, you will see **Click or Drag Files Here to Attach** This area will allow you to:

- Drag and drop your document, or
- **Paste** (by right clicking), or
- **Select** a specific document from a folder on your (by right clicking)

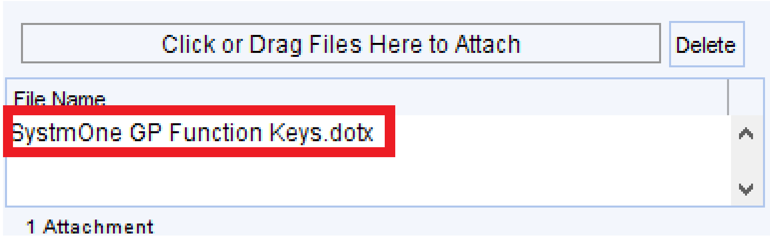


Note: Dependant on size of the attachment an Information box may display



3. Click **Ok**

You will now see the document listed within the task



4. Add the usual required details to the Task such as Type, Text and Recipient

5. Click **Ok**

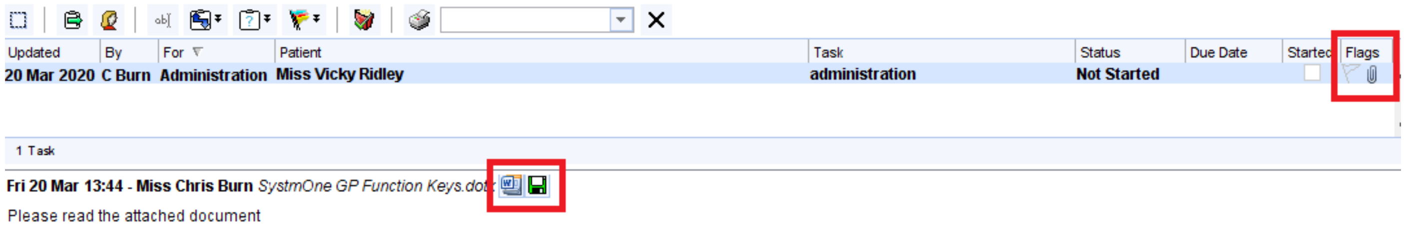
   Note: the task will not be sent until you **Save** or **Discard** the patient's record

Viewing and Saving the Document from a Task

When a task is received with an attachment a Paper Clip will display in the Flags column

1. To view the document from a task, click **Word**, this will open the document to be viewed

2. To save the document into a specific folder, click **Save**, this will open your folder directory which will allow you to save the document as required.



3. The document can also be viewed as an attachment within the Patients record, found in the Record Attachments Node within the Clinical Tree.