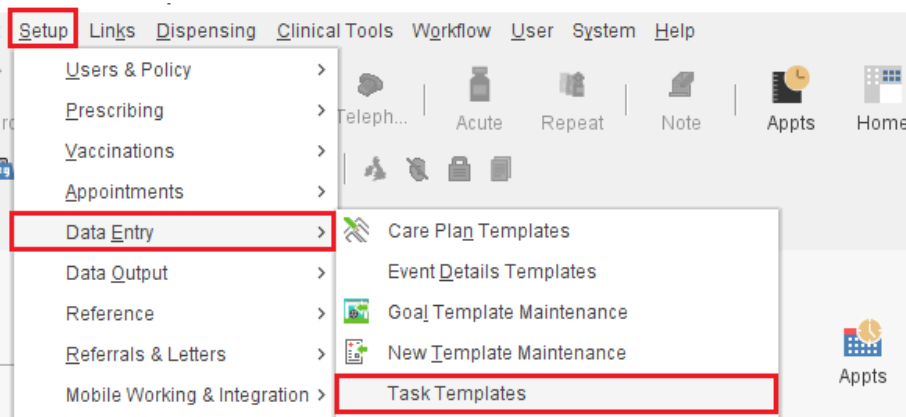


NECS Clinical Systems Specialist Team SystemOne – Creating Task Templates

Creating Task Templates

1. Click **Set-up – Data Entry** and Click **Task Template**



2. Click **New Task Template**, name the task template, click to select an **icon** and complete a description for use



3. Click the **default recipient** to send to for example staff member, user group
4. Click the appropriate **category for the task** (task type)
5. If appropriate click a **status for the task** (can leave blank)
6. If **flags** are used click to select if appropriate
7. If appropriate select **due in (days)** or leave blank (the task will display as red text when overdue)

8. Type the body of the task that will be sent

New Task Template

Name: Book an appointment within 5 days

Icon: [Clock icon]

Description: Use for GP appointments

Recipient: NECS GP

Unassigned
 User group Administration [Members]
 Staff member
 Usual clinician
 All recipients must complete

Category: Appointment Request

Status: Not Started

Flag: No flag

Due in: 5 days

Task body: Please book an appointment with a GP within 5 working days

Using a Task Template

1. Retrieve a patient record
2. Click **Task** from the toolbar
3. Click **Apply Template** and select an appropriate **task template**

New Task

Ok Apply Template Cancel

For: NECS GP

Settings

Select Task Template

Enter text to search

Icon	Name	Task Type
▲	2ww Completed	2ww Cancer Referral
▲	Book 2 WW E-Referral	2ww Cancer Referral
🕒	Book an appointment within 5 days	Appointment Request
🕒	Book Appointment	administration
📄	Chronic Disease	Miscellaneous

4. The new task dialogue will now be pre-populated
5. Changes can still be made at this point if necessary
6. Click ok and **save the patient record**

Tip

Task templates can be used as quick actions in various areas of SystemOne: Data Entry Templates, Clinical Views, Toolbars, Protocols and E-Workflow