Partners in improving local health

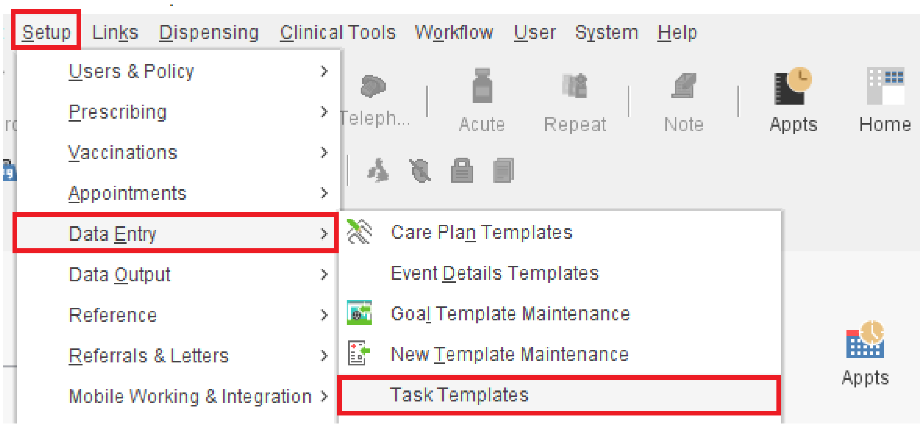
North of England Commissioning Support

NECS Clinical Systems Specialist Team

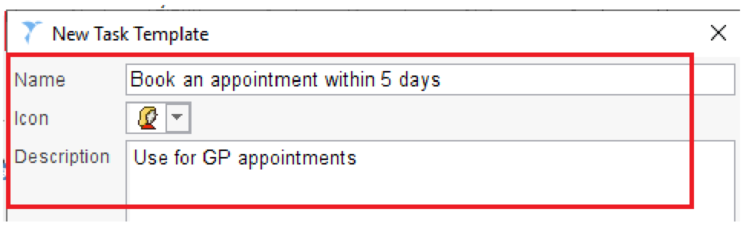
SystmOne – Creating Task Templates

Creating Task Templates

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

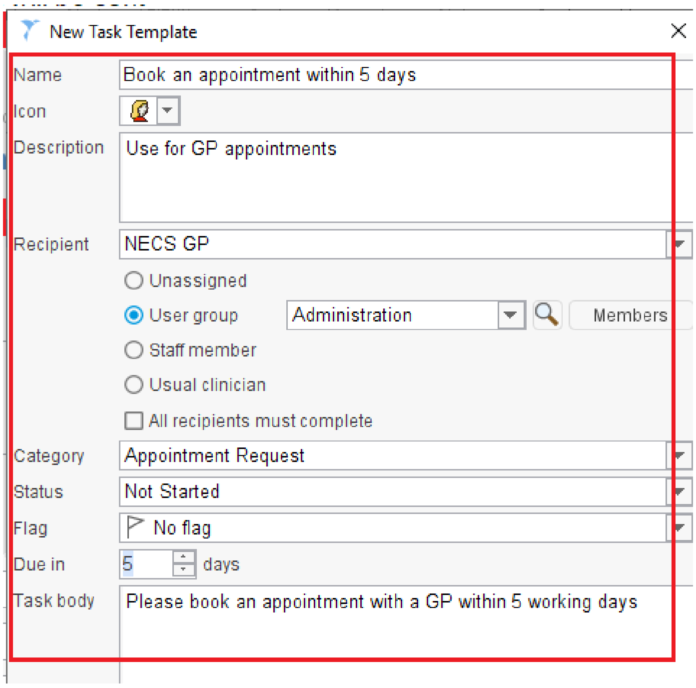


2. Click **New Task Template**, name the task template, click to select an **icon** and complete a description for use



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

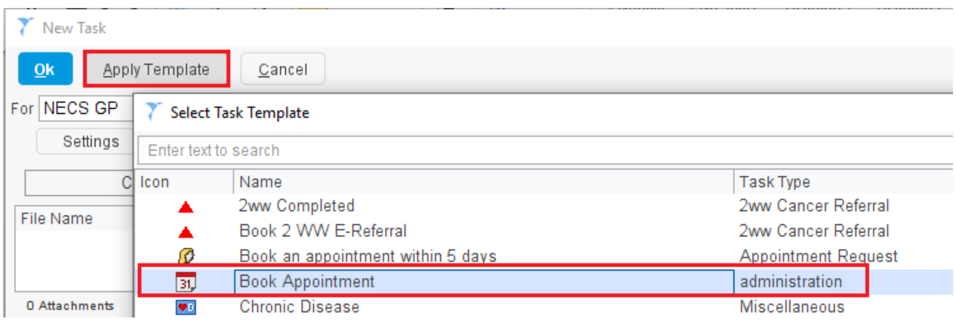


Using a Task Template

1. Retrieve a patient record

2. Click **Task** from the toolbar

3. Click **Apply Template** and select an appropriate **task template**



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 SystmOne:
Data Entry Templates, Clinical Views, Toolbars, Protocols and E-Workflow