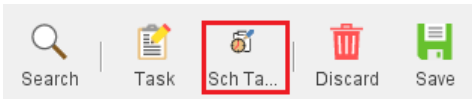


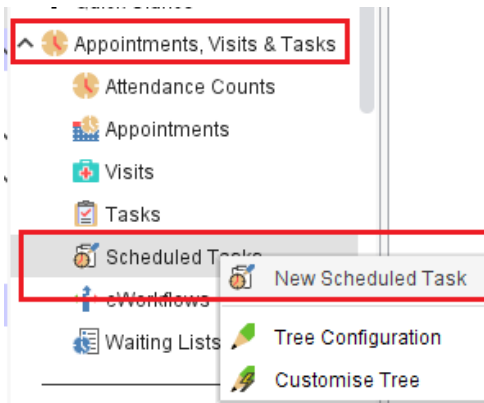
NECS Clinical Systems Specialist Team SystemOne – Scheduled Tasks

Creating a Scheduled Task

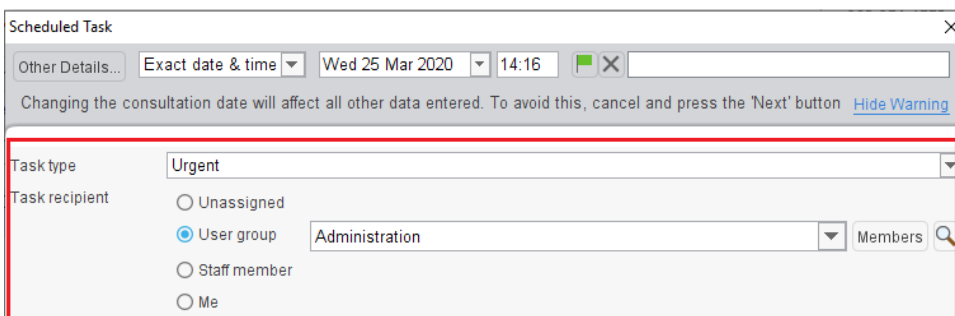
1. Retrieve a patient record
2. Click **Scheduled Task** by using one of the following methods:
 - a. Click Scheduled Task from the toolbar (if configured)



- b. From the Clinical or Administrative Tree click **Appointments, Visits & Tasks** right click **Scheduled Task** and select **New Scheduled Task**



3. Select an appropriate **Task Type** and **Task Recipient**



4. Type the **Body of the Task** and select the **scheduled date** to when SystemOne will send the task.

Note: the task may not appear for the recipient until the day after the date set

- 5. If applicable tick to select if this is to be repeated / scheduled every day / weeks or years and if this will be manually stopped or a specific date will be set to stop

The screenshot shows a form for creating a task. A red box highlights the 'Task body' field containing the text 'This is a Training Scheduled Task'. Another red box highlights the 'Creating the task on' field with the date '01/04/2020' and a note: 'Note that the task may not appear until the day after this date'. A third red box highlights the 'Repeating every' section, which includes a checkbox for 'Repeating every', a value of '1', a 'Years' dropdown, and an 'Until' section with radio buttons for 'Manually stopped' (selected) and 'Specific date'.

- 6. Click OK, click to **Save** the patient record

Viewing, amending and cancelling a Scheduled Tasks

- 1. Retrieve the patient record, click **appointments, Visits and Tasks** and select **Scheduled Tasks**
- 2. All scheduled tasks for the patient will be displayed
- 3. Highlight the appropriate scheduled task and click one of the following:
 - a. Click **Amend Schedule** make any necessary changes

The screenshot shows the 'Scheduled Tasks' interface. At the top, there are buttons for 'New Scheduled Task', 'Amend Schedule' (highlighted with a red box), and 'Cancel Schedule'. Below these is a table with columns for 'Created', 'Status', and 'Details'. The table contains one entry: '25 Mar 2020', 'Scheduled Task Creation', and 'administration task (Training schedule task) to be sent to Administration on 01 Apr 2020'.

- b. Click **Cancel Schedule**, click **Yes** to confirm to want to cancel

This screenshot is identical to the previous one, showing the 'Scheduled Tasks' interface with the 'Cancel Schedule' button highlighted with a red box.

- 4. **Save** the patient record if changes have been made to the scheduled task