North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team
SystmOne – Scheduled Tasks

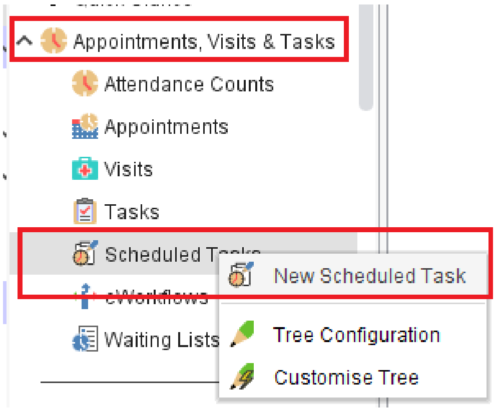
Creating a Scheduled Task

1. Retrieve a patient record

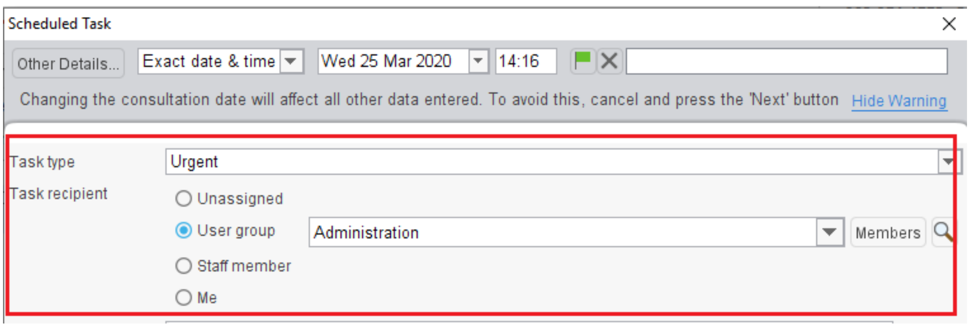
2. Click **Scheduled Task** by using one of the following methods:

   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**



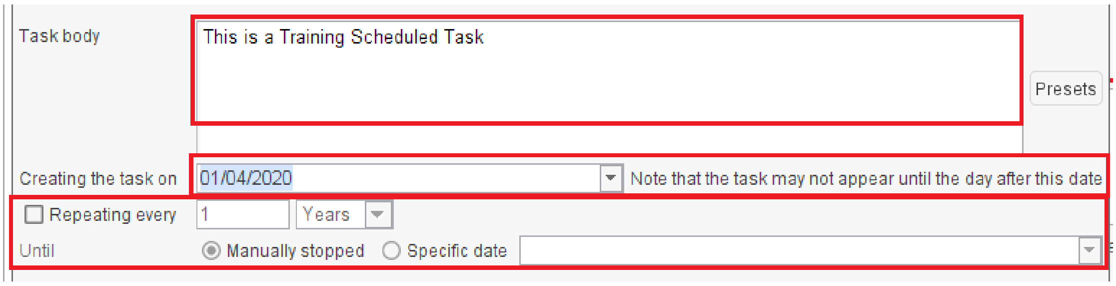
3. Select an appropriate **Task Type** and **Task Recipient**



4. Type the **Body of the Task** and select the **scheduled date** to when SystmOne 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



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

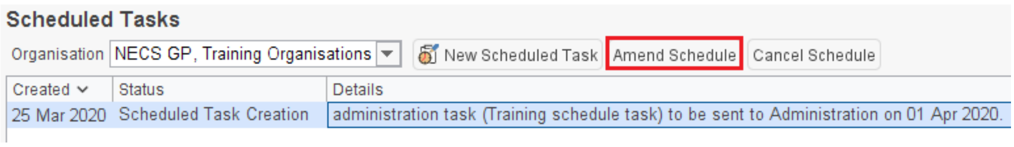
Viewing, amending and cancelling a Scheduled Tasks

1. Retrieve the patient record, click **appointments, Visits and Tasks** and select **Scheduled Tasks**

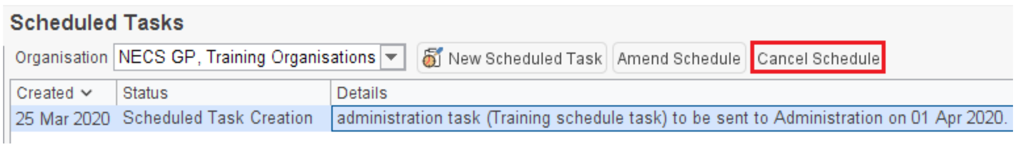
2. All scheduled tasks for the patient will be displayed

3. Highlight the appropriate scheduled task and click one of the following:

    a. Click **Amend Schedule** make any necessary changes



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



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