NHS

North of England Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team
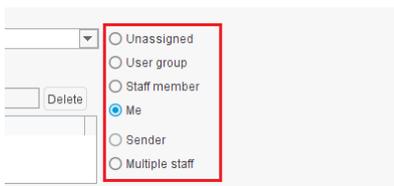# SystmOne Sending and Viewing Tasks

Sending a Patient related Task

Note You can send a task not relating to a specific patient. To do this just skip the first instruction here.
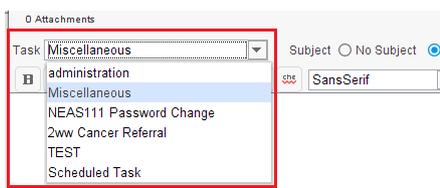
1. **Search** for and open a patient record

2. Click **Task**

3. Choose the recipient using the radio button; you will not be able to use Sender as this is a new task.

4. Choose a task type – this list can be added to by your practice. If you have a pencil icon here you can create your own.

5. Click into the white box to type your task message

6. Select a status option, if appropriate, default is **Not Started**, set a **Due** date if needed. Select a **Flag** if used at your practice.
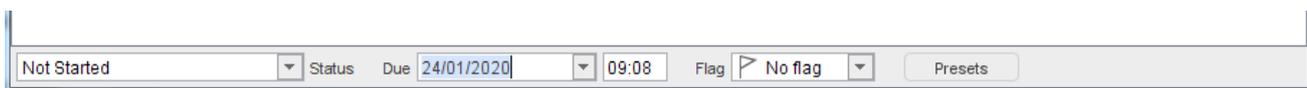
7. Click **Ok** at the top of the dialogue box to send the task

You will still be in the Patient Record as the task has not been sent yet. **You will need to close the record for the Task to be sent.**

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8. **Save** or **Discard** the patient record – as required.

    Note If discarding the record you will be asked if you still want to send the task. Click **Send** or **Do Not Send** as appropriate.

Viewing Tasks in the Task List

1. The Task can be found in your To Do area. Click the **Tasks** To Do Button to open a preview of your tasks
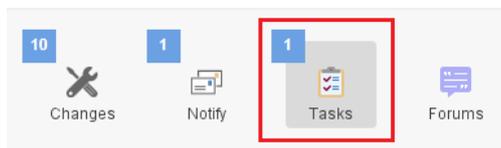
2. In the Task List screen which you can get to via the status bar at the bottom of your SystmOne screen.
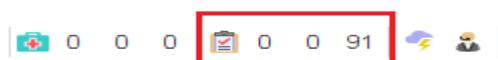

    The first number in the task status bar displays tasks sent direct to you. **The second number** displays those tasks as well as tasks sent to any group you belong to.

3. Double click on either number to view your tasks from within the Task List screen

    Please remember that tasks are <u>not private</u>, they can be viewed by anyone in the task screen and in the patients record

Viewing Tasks in the Patient Record

Open tasks relating to a patient can be found on the **Patient home** screen
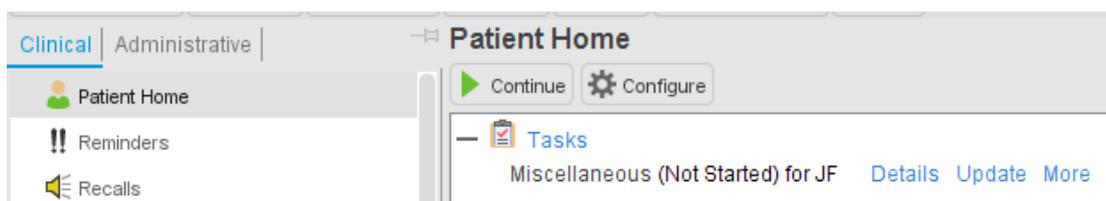
All tasks relating to patients (including completed) can be found in the patient's record in the **Appointments, Visits and Tasks** node of the Administrative Tree or using the yellow clock icon on your toolbar.