

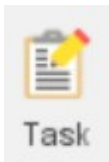
NECS Clinical Systems Specialist Team

Sending a Task to another SystemOne Organisation

Note: The practice may have restricted the ability to send tasks to other SystemOne units when a patient has not consented to sharing. In this case a “Consent to Share Out” must be recorded before you send the task.

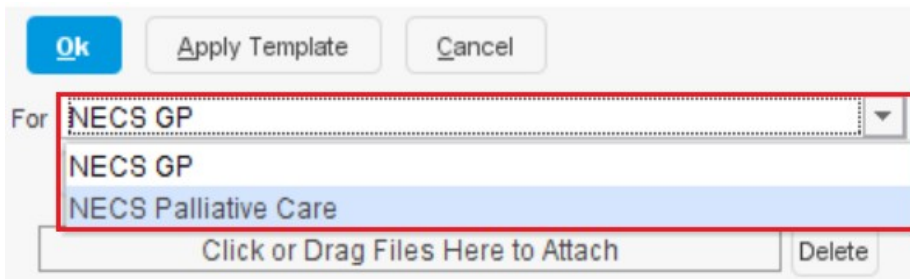
Sending a Patient Related Task to another S1 Organisation

1. From within the patient record click on the **Task** button in the toolbar – you can also send a task from within the **Workflow** menu.

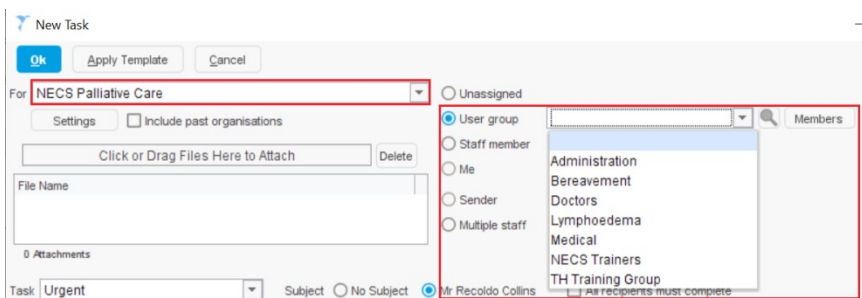


2. The **New Task** box will display.

3. Click the **For** drop down menu and select the organisation to send the task to.



4. The **User Groups** or **Staff** members for the selected S1 unit will now be listed for selection. Select an appropriate recipient.



5. Select an appropriate **task type** and type **your task message** into the white field area.

The screenshot shows a task creation window. At the top, there is a 'Task' dropdown menu with 'Urgent' selected. To the right, there are radio buttons for 'Subject' (unselected) and 'No Subject' (selected), and a checkbox for 'All recipients must complete' (unchecked). Below this is a rich text editor toolbar with various icons for bold, italic, underline, link, unlink, list, and table. The text area contains the message: 'Please see Referral dated 26 March 2020'. At the bottom, there are fields for 'Status' (set to 'Not Started'), 'Due' (empty), 'Flag' (set to 'No flag'), and a 'Presets' button.

6. Set a due date and select a flag if required.

7. Click **Ok** when complete

8. **Save** or **discard** the patient record – as required. This will send the task as normal.

