

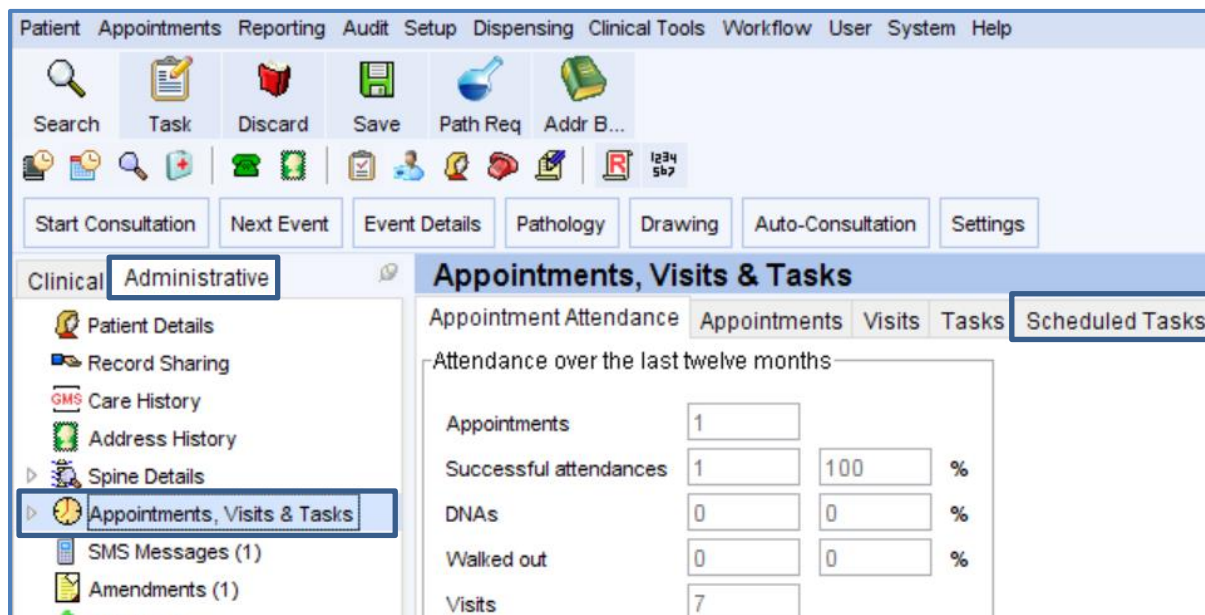
SystemOne Quick Reference Guide

Scheduled Tasks

The ability to schedule a task provides an alternative to using a reminder or a recall, for example to remind you that a patient needs a test or follow-up on a future date.

Creating a Scheduled Task

- **Retrieve** the patient record
- Select the **Administrative Tree**
- Select the **Appointments, Visits & Tasks** node
- Select the **Scheduled Tasks** tab in the pane to the right of the Tree



The screenshot shows the SystemOne interface. The top menu includes Patient, Appointments, Reporting, Audit, Setup, Dispensing, Clinical Tools, Workflow, User, System, and Help. Below the menu is a toolbar with icons for Search, Task, Discard, Save, Path Req, and Addr B... A secondary toolbar contains Start Consultation, Next Event, Event Details, Pathology, Drawing, Auto-Consultation, and Settings. The main area is divided into 'Clinical' and 'Administrative' sections. The 'Administrative' section is active, showing a tree view with 'Appointments, Visits & Tasks' selected. The right pane displays the 'Appointments, Visits & Tasks' section with the 'Scheduled Tasks' tab selected. Below the tabs is a table showing attendance over the last twelve months:

Attendance over the last twelve months			
Appointments	1		
Successful attendances	1	100	%
DNAs	0	0	%
Walked out	0	0	%
Visits	7		

- The **New Scheduled Task** screen displays (any tasks already scheduled for the future will be listed here)



The screenshot shows the 'New Scheduled Task' screen. The top menu includes Appointment Attendance, Appointments, Visits, Tasks, Scheduled Tasks, Workflows, Waiting Lists & Therapy Groups. The 'Scheduled Tasks' tab is active. The 'Organisation' is set to 'Essex Help desk, Training Organisations'. The 'New Scheduled Task' button is highlighted. Below the buttons is a table showing the details of the scheduled task:

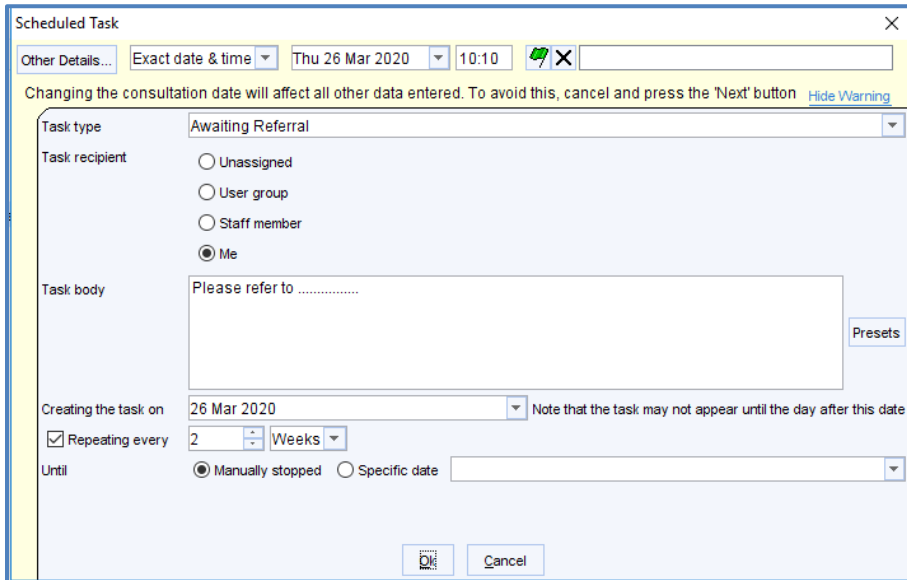
Created	Status	Details
25 Mar 2020	Scheduled Task Creation	Book appointment with Doctor routine task (Please do a referral letter for this patient) to be sent to Lesley Bullen on 25 Mar 2020. Repeated every 1 days.
25 Mar 2020	Scheduled Task Creation	Awaiting Referral task (Please do a referral letter for this patient) to be sent to Lesley Bullen on 25 Mar 2020. Repeated every 1 days.

- Select 

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- The **Scheduled Task** screen displays



Scheduled Task

Other Details... Exact date & time Thu 26 Mar 2020 10:10

Changing the consultation date will affect all other data entered. To avoid this, cancel and press the 'Next' button [Hide Warning](#)

Task type: Awaiting Referral

Task recipient:

- Unassigned
- User group
- Staff member
- Me

Task body: Please refer to [Presets](#)

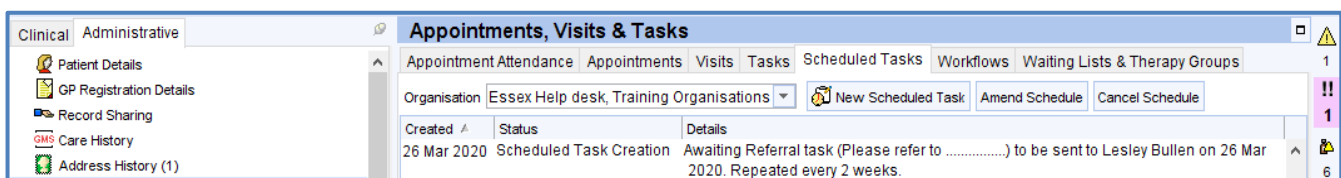
Creating the task on: 26 Mar 2020 Note that the task may not appear until the day after this date

Repeating every 2 Weeks

Until: Manually stopped Specific date

[OK](#) [Cancel](#)

- Select the **Task Type** by clicking on the drop down arrow
- Select the **Task recipient**
- Enter the **text required in the Task body** window (*Presets can be created and used for this*)
- Set the date in the **Creating the task on** box for when the task should appear for the recipient
- If required set the **Repeat every** option
 - If selecting **Manually stopped**, once the task has been completed, the repeat action will need to be cancelled via the Schedule Task tab by right clicking on the task and selecting **Cancel Task Schedule**
 - If selecting **Specific date**, enter the date the repeat option is to stop in the box provided
- Click **OK**
- The **Schedule Tasks** tab displays showing the scheduled task that has been created



Created	Status	Details
26 Mar 2020	Scheduled Task Creation	Awaiting Referral task (Please refer to) to be sent to Lesley Bullen on 26 Mar 2020. Repeated every 2 weeks.

- Save** the patient record
- When the set task date arrives the task will appear in the recipient's Task List and on the patient's record home screen