VIADUCT CARE CIC
The Stockport GP Federation

NHS
Stockport
Clinical Commissioning Group

How to send a Task		
Reference	**How To Guide 44**	
Version	**1.2**	
Approval date	**01.02.2019**	**Approved by Dr Becky Locke & Dr Simon Woodworth**
Review date	**01.02.2020**	

1. Purpose:

To enable the user to send messages (tasks) for action to individuals or groups and provide an audit trail to help manage tasks that are received or sent.

There are various types of task available in EMIS Web e.g. patient tasks, these are used for actions or information linked to specific patients.

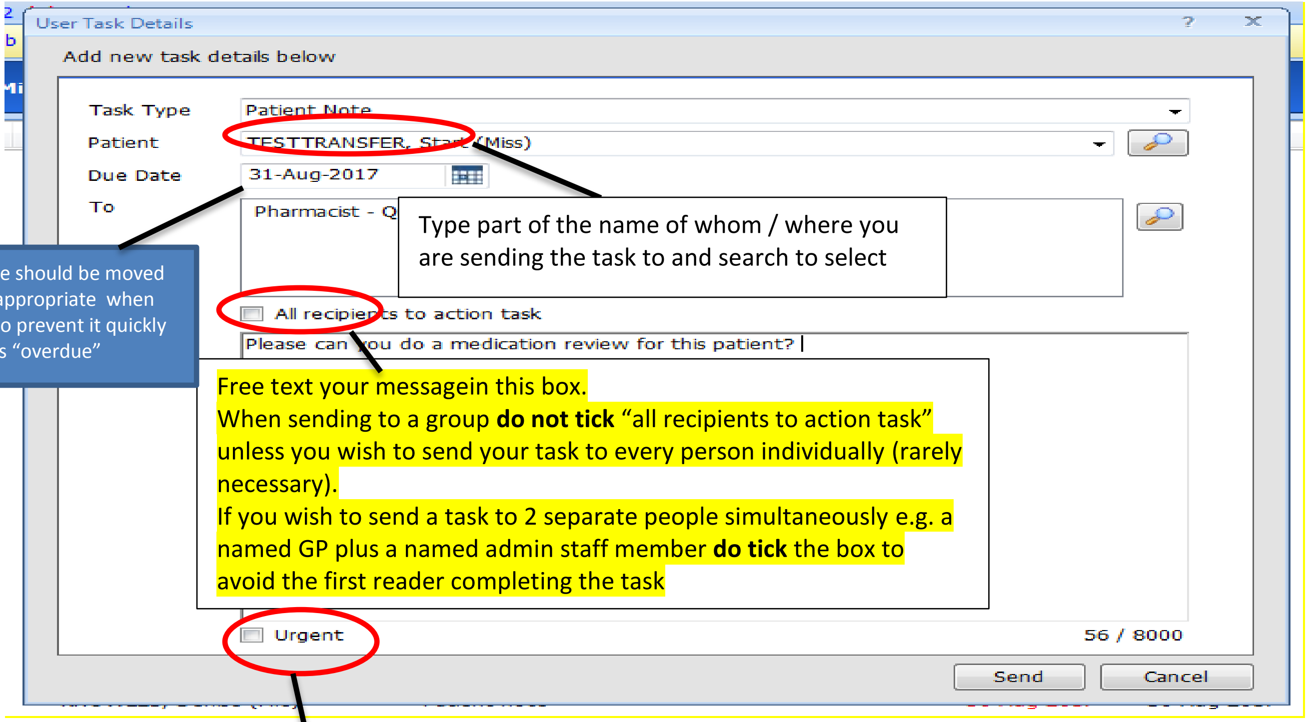
2: Procedure:

How to send a Patient Task

Go to Workflow view and click on “Add Task”, a box will appear as per picture below

Click on the down arrow to select the correct type of task –usually Patient Task

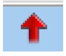
NB. It is only possible to reply to the sender of a task, not to all the members of a group



The due date should be moved forward as appropriate when not urgent to prevent it quickly appearing as "overdue"

Type part of the name of whom / where you are sending the task to and search to select

Free text your messagein this box.
When sending to a group **do not tick** "all recipients to action task" unless you wish to send your task to every person individually (rarely necessary).
If you wish to send a task to 2 separate people simultaneously e.g. a named GP plus a named admin staff member **do tick** the box to avoid the first reader completing the task

Only tick this box when the task is classed as urgent. The task will then be highlighted to the recipient as "urgent" with this symbol  and move to the top of the task list

Task Icons and Indicator Chart

The following indicators are used within the tasks screen

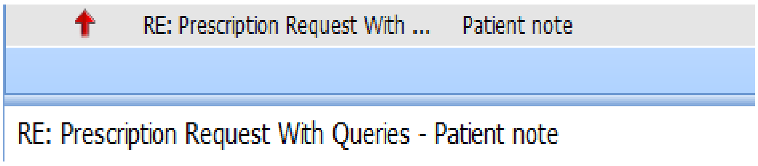
Icon	Indicates
Red text in the Due Date column	Overdue tasks.
	High priority tasks (displayed at the top of the list).
	Completed sent tasks.
	Tasks that have been replied to.
	Tasks that have been forwarded to another user and retained by the sender for reference
	Tasks with notes attached to them. To read the note, click the icon.
	Tasks owned by a user (or group) other than the currently logged-on user. To show the task owner (or groups) name- hover over the icon.

Looking at all tasks (for action) sent to any groups you may be included in or specifically sent to you

Subject

Click on subject to arrange patients in alphabetical order

You may also see urgent Patient Notes under this heading that have been sent directly from a GP after dealing with a prescription request. These need to be dealt with as soon as possible.



Task Type

Click on task type to group tasks together e.g. **Patient notes or Prescription**

- Patient tasks: used for actions or information linked to specific patients.
- Prescription team: e.g. user may send a task to look into overdue medication reviews

Using either of these two options will permanently attach the task to the patient's record which is auditable

Due Date

Click on Due Date to arrange tasks by date, click the up arrow to bring the oldest tasks to the top of the list and the date will be in red if overdue, click the down arrow to move the newest tasks to the top

Created

This date will inform you when the task was created. It is possible to add a future date on a task if it is not urgent to delay it showing as overdue within a short time scale

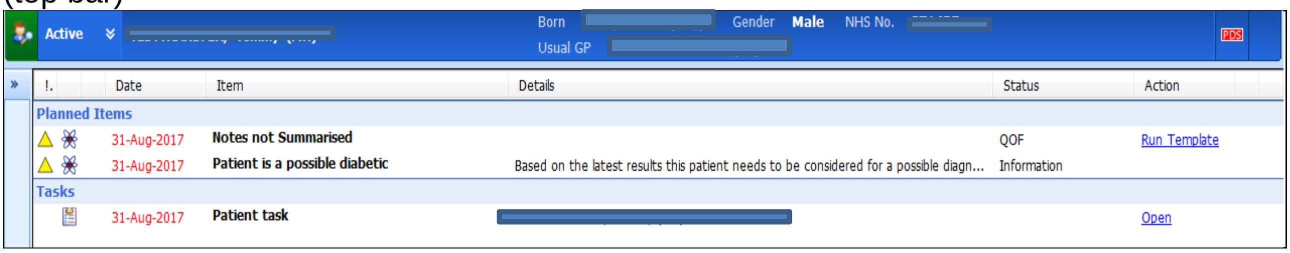
Sender

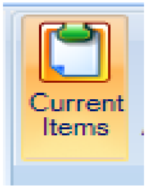
Click on sender to arrange tasks by the sender (useful if you wish to identify a task quickly and have no information other than who it was sent by)

Click on  **(**if this symbol is present) to view the task owner or group e.g. Medicines Optimisation Team or Appointments

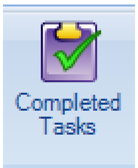
<u>Looking at Individual Patient Tasks in their Diary</u>

You can view any current or completed tasks for a patient in their record by clicking on Diary (top bar)



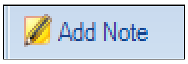


Click Current items to view current tasks, diary entries or booked appointments



Click Completed Tasks to view any previous tasks for the patient (This is a useful auditing aid for looking at previous Medicines Management requests)

Post it Notes



It is possible to attach a Post It Note to a task which is useful for recording notes e.g. “phoned patient 01.09.17 4.20pm” when you wish to keep the task in a group before completing it or forwarding it on.

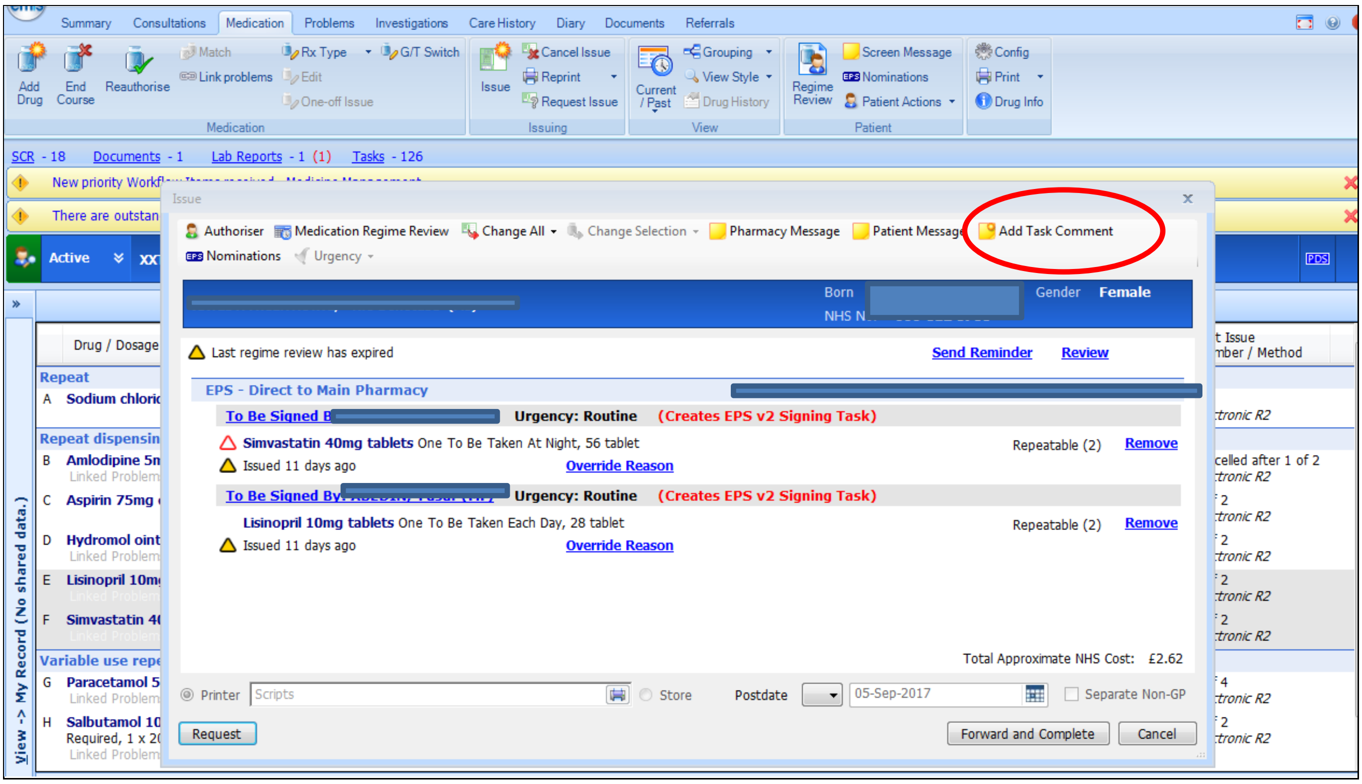
Please be aware – when forwarding the task, copy the notes from the post it and paste them into the forwarded message to avoid them being deleted.

If the task is being completed (not forwarded) the note will remain attached to the task.

To view a post it note in a patients completed tasks, click on “**open**”

It is also possible to attach a Post It Note to a Medicines Management request once sent to add any further information that you may want the GP to see.

Adding a Task (comment) to a prescription request



It is possible to add a Task comment to the GP when requesting a prescription. This can be used to give the GP some supporting information while avoiding the use of requesting a prescription via Medicines Management “Request Issue” e.g. date of blood pressure readings or helpful comments like ‘early for holidays’ etc.