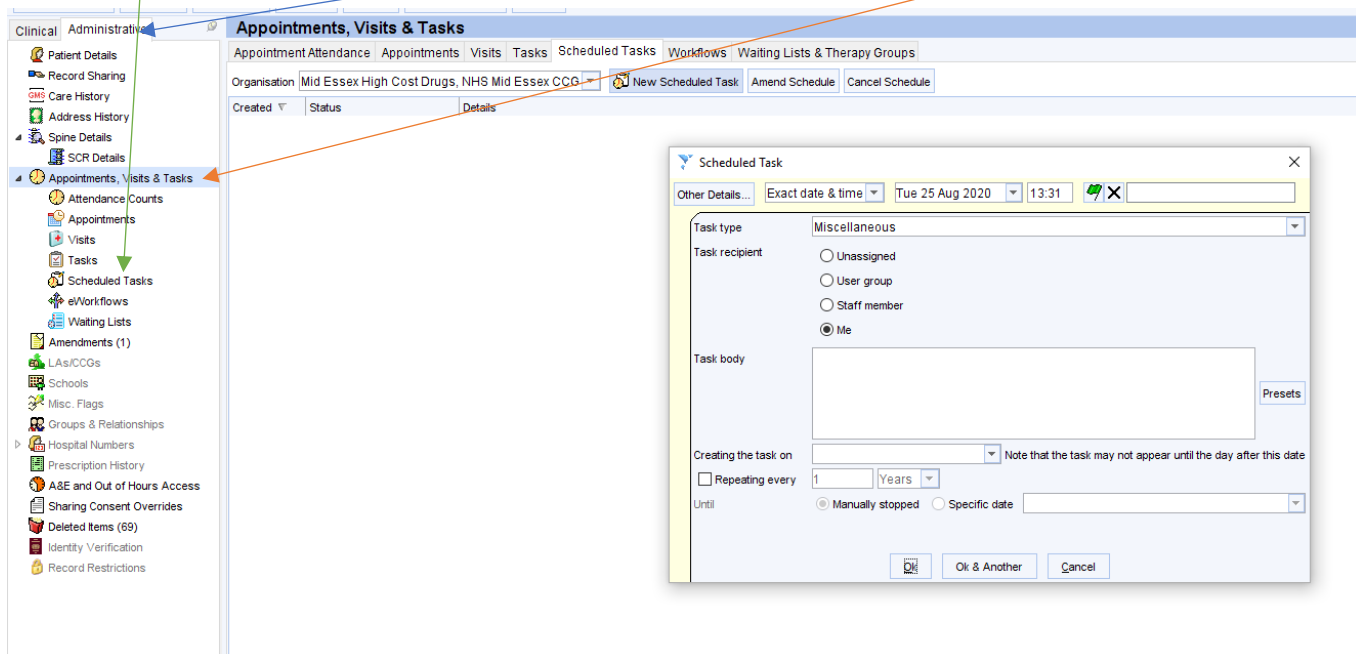


“Need A Reminder – think scheduled tasks”

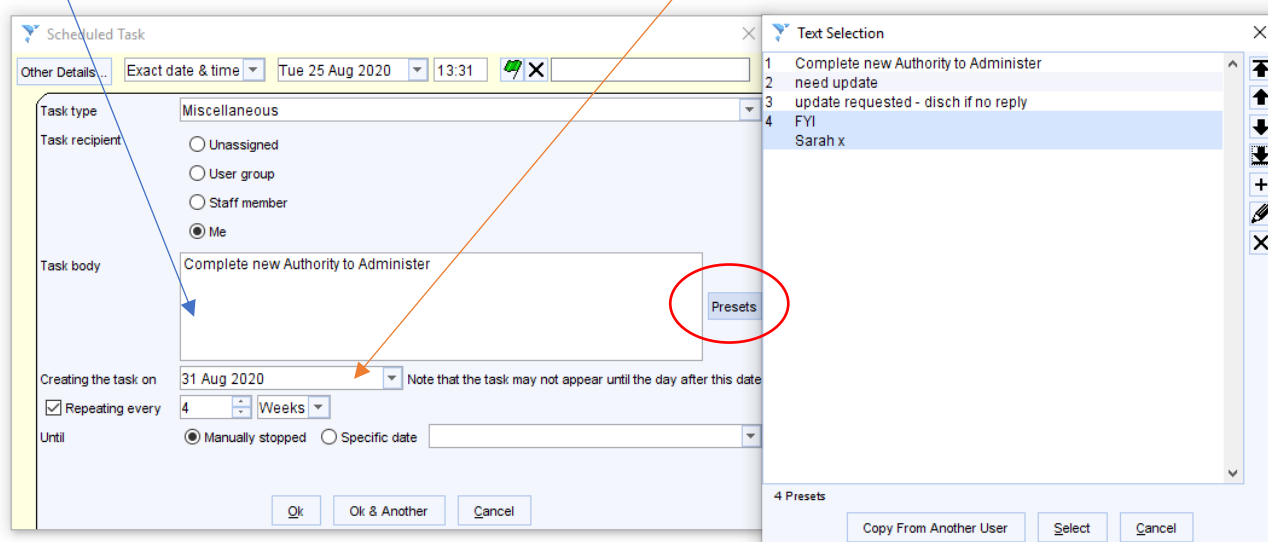
How to Guide

SystemOne has an ability to set up a task with a scheduled future date. This can be very useful for following up on referrals, results and can also be used as a reminder that a new Authority to Administer Palliative Care medication is due. They can also be used for regularly recurring tasks. These can be sent to yourself, to a particular user group or another individual.

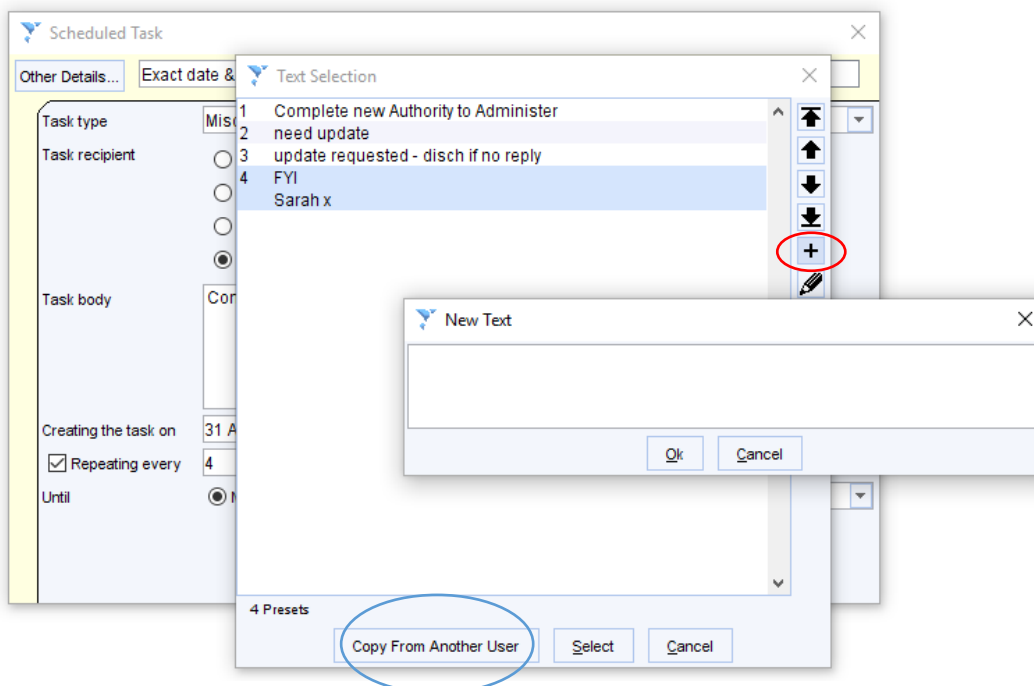
- When in the patient record, select the Administrative tree, then select Appointments, Visits & Tasks, then select Scheduled Tasks



- Put the day before you want the task reminder to appear in the date box. Add your message reminder in the Task body.



- You can use presets for anything you use regularly. These can be set up by selecting Presets and then the + for new message or you can “copy from another user” in your organisation

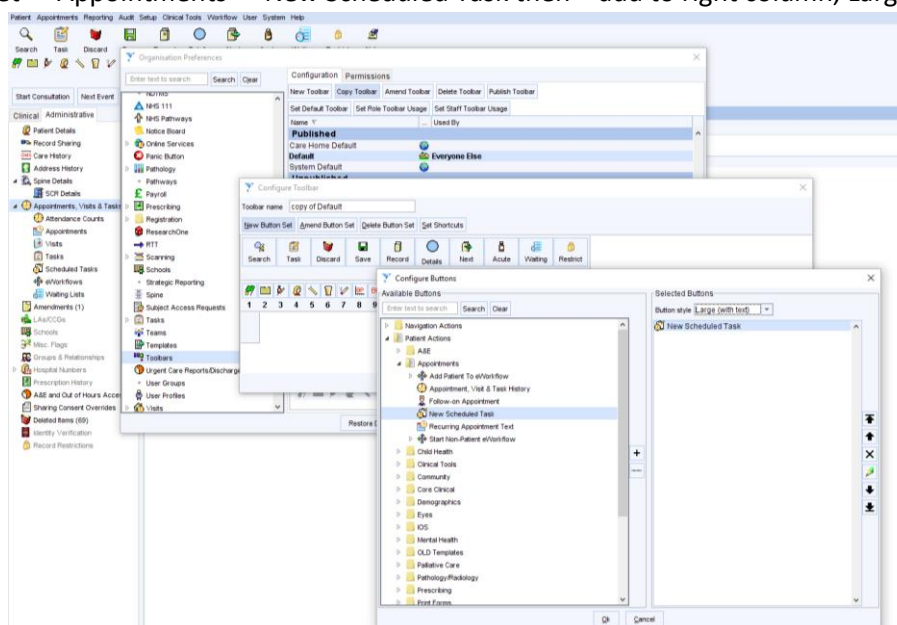


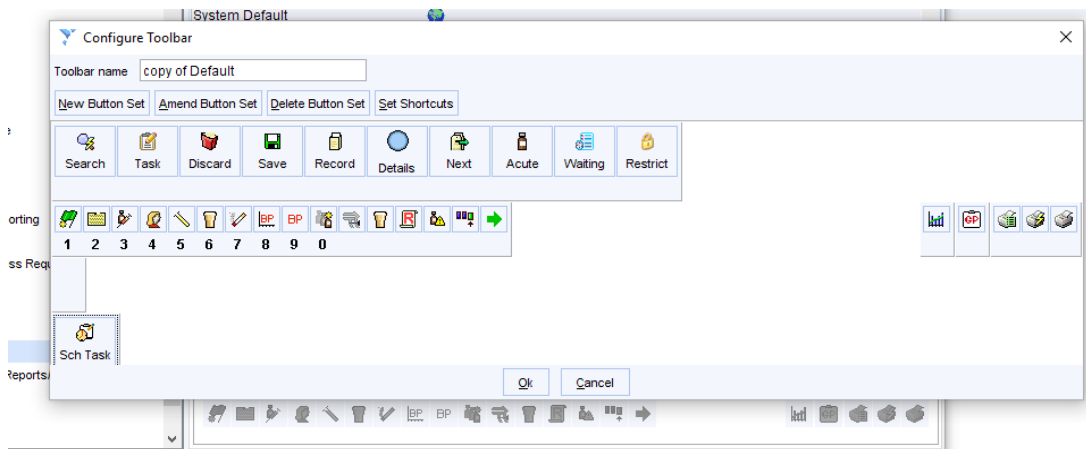
- Your task reminder will now appear in your Tasks list on or the day after the date you have selected for you to action as appropriate.

[A helpful tip from Dr Will Bentley at Whitley House Surgery](#)

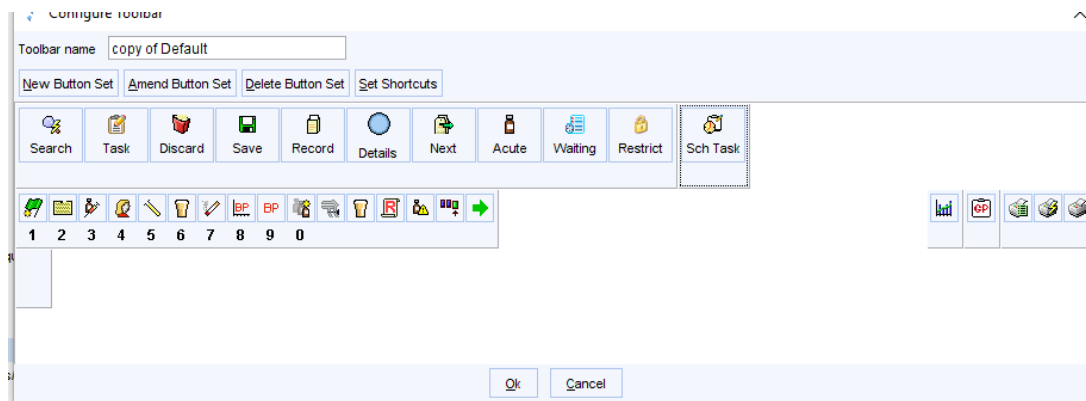
Add a scheduled task button to the toolbar for ease of access. This needs to be done at Organisation Level to appear on everyone’s toolbar and by a System Administrator.

- ❖ Click on Setup -> Organisation Preferences
- ❖ Click on Toolbars -> amend or new toolbar
- ❖ New button set -> Appointments -> New Scheduled Task then + add to right column, Large with Text





❖ Drag the new button into position on the large toolbar



❖ Click on OK to save – this should add the button to the toolbar everyone within the practice

with thanks to Dr Bentley for his advice on how to set this up