

## Primary Care Directorate

### Actioning Tasks in Practices

Version	2.0
Approved By (sponsor group)	Clinical and Non-Clinical Policy Review Group
Ratified By	Quality and Assurance Group (QAG)
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#### Version Control Summary

Version	Date	Author	Comment
1.0	10 <sup>th</sup> February 2022	Joanne Alder-Pavey	Original
2.0	5 <sup>th</sup> October 2022	Lizzy Burraway	Updates to capture GPSU activity

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## 1. Purpose

The purpose of this SOP is to:

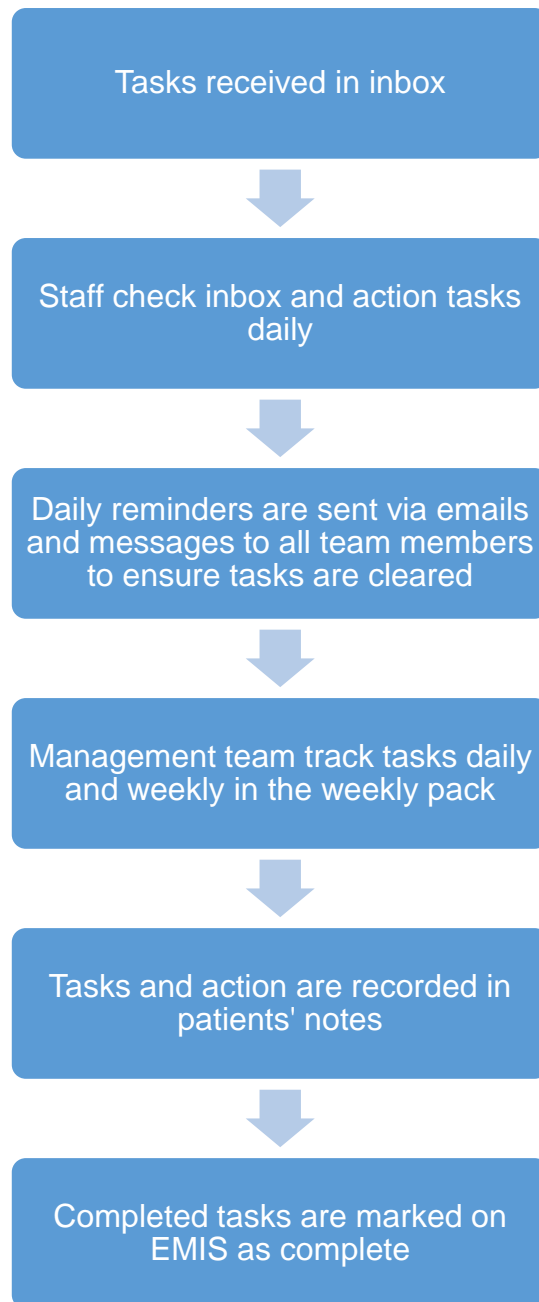
- Ensure tasks sent and received within the clinical system are managed in a timely manner
- To ensure efficiency and mitigate any risks of tasks not being received

## 2. Process (Systemone)

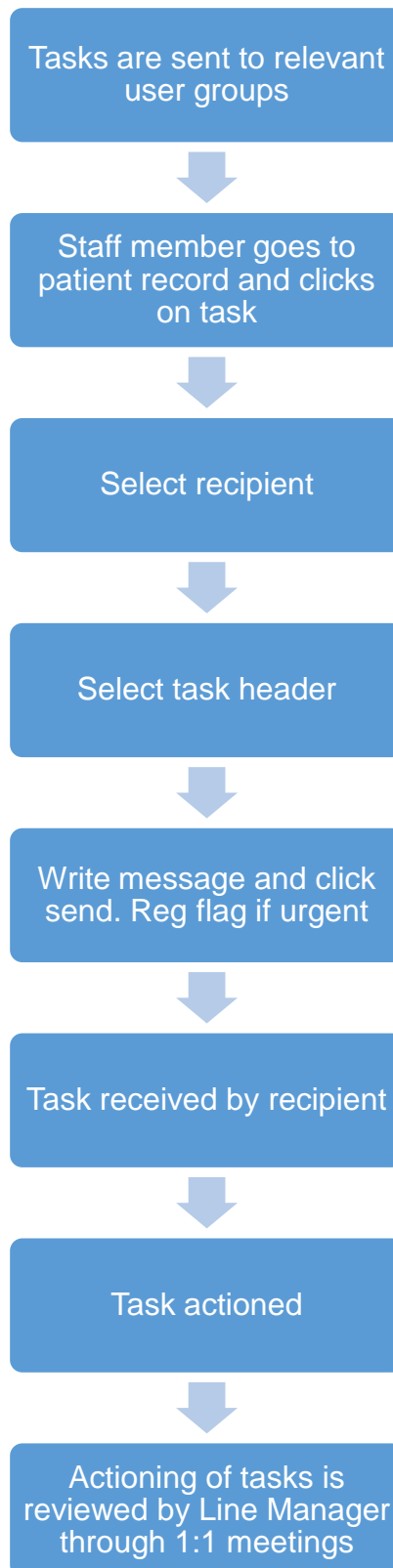
Tasks set up within each clinical system will be different as this is based on local requirements. It is important to identify the relevant task groups and types and assign to the relevant responsible person.

- The appropriate designed person within the practice will check the clinical system each morning and afternoon to monitor task inboxes.
  - All red flagged tasks should be reviewed every three hours to assess the urgency and nature of the task and action as appropriate
- The unassigned task inbox must be reviewed twice daily and re-directed as appropriate
- The status of the task must be updated regularly to indicate that they have been started, seen but not started or complete
  - When updating a task a due date should be listed in the comments. This will support ensuring all tasks are picked up in a timely manner.
- If a task is being sent to another appropriate person or group, the task must be updated and **MUST NOT** be marked as complete as this will not send the task to the person
- Tasks can be used with external services with access to the system e.g., health visitors and community matrons.
  - Sending tasks in patient records should be done with care and consideration, taking responsibility to the nature and wording of the task is appropriate.
- Tasks should not be deleted as important information and audit trails can be lost.

## Greenhouse Practice and Health E1



## Cauldwell Medical Centre & Leighton Road Surgery



## Newham Transitional Practice

