



Provincial Safety Management System

Tasks

Step 1

Go to your **Info Center** and select the incident event by clicking on the underlined <u>File ID</u> number i.e.: <u>12345</u> to open the event.

Step 2

To create tasks within a file:

1. Click on **Tasks** located under **File Notifications** on left hand side of screen. The *Tasks* dialog opens as seen in this screen shot.

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| † | () psrmscft01/RL6_Training/FilePage.aspx?file=65227&form=FallManage&Retur | nUrl=%2fRL6_Training%2fapp | .aspx%23%2ffileViews%2f9&alert1 | ld=&showhideack= | C | Q, Search | | 4 | | ≡ | | |
| RL | software for safer healthcare | | | | | Dashboards | Bookmarks 👻 | Logged in as Krista | Paquet 🕶 | 1 | | |
| ^ () | Fall Management Form - 65227 Add Follow up - | | Type of Person Affected | | | | | | < | • | | |
| 0 7 9 | Table of Contents Person Affeded When and Where Event Occ | | type of Person Affected | * PATIENT/RESIDENT/CLIENT Matthew Campbell | | • | | | | Ē | | |
| Q | Details of the Event Details of the Event - Continu Injury Details | Click the Lookup icon to search the Patient Database | Reported for | | | | | | | | | |
| | File Notifications | | LastName *TEST | r | | | | | | | | |
| ĿJ | Alerts (0) Tasks (0) Summaries Stown 00 | | First Name \star TEST | r | | | | | | | | |
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| | | | Gender Street 1 | • Street 2 | | | | | | | | |
| | | | City | Province | | • | | | | | | |
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- 2. Click on Create Task. A window will open for you to complete the necessary task fields.
- **3.** Complete the mandatory fields (*) as well as all other necessary fields. Be sure to delete your name from the **Re-Assign to** box and *replace it with the person you are sending the task to* by entering their name in the **Re-Assign to** box.
- 4. Put your task in the Description Box.
- 5. Select a reminder date. This should be a few days before the **Deadline Date**.
- 6. <u>Always</u> select the Email Notification box.

7. You have the option to send the email to yourself (Creator) and the Assignee **OR** just to the Assignee.

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| RL | software for safer healthcare | | | | | Dashboards Bookmarks + | Logged in as Krista Paquet 👻 |
| | Fall Management Form - 652 | | | | | | |
| () | Add Follow-up + Table of Contents | Add/Modify Task | | | - | ? | <. |
| | Person Affected | Type * | • | File ID Deadline | 65227 🔍 🗙 | | 0 |
| 8 | When and Where Event Occ Details of the Event | Re-Assign To 🗙 | | | | | i. |
| | Details of the Event - Continu Injury Details | Description | | | | | |
| | File Notifications | | | | | | |
| | Linked Files (0) Alerts (0) | | | | | | |
| | Tasks (0) Summaries Sho | Reminder Date | | Email Notifications? | V | | |
| | Audits File Exports | te 98 Completed | | Send Emails to | Assignee and Creator | | |
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| | | | | | Cancel | Open File OK | |
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| psmscft01 | l/RL6_Training/TaskDetail.aspx?task=0&formD | sHash=aedca4f9-bcda-4e05-8790-1e76 | 976f5400&fileid=65227# | | | | More Actions + Save & Exit |
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- 8. Once fields are completed select OK. The Task has been now sent to the recipient. (Note: If you would like to send another task to another person/recipient repeat the steps above.)
- 9. To Save your task and exit the file: Select SAVE & EXIT at bottom of page on right hand side.
- 10. To Save your Task and continue working in the existing file: Select the More Actions tab at the bottom of the right hand side and select from the drop down list Save. Always select Save. Then select Exit.

Step 3

To complete your task

- **1.** Open up incident file as in Step 1.
- 2. Record action done for the Task by selecting Add Follow Up and then go to Work Done on File - (In the Subtype drop down list select "Task Complete" at the bottom of the drop down list and complete all necessary fields)
- 3. Click on ADD. This will automatically save your work.
- 4. To show you have completed your task: Under File Notifications select Tasks and click on the word Complete. Please confirm to complete the task select OK.
- 5. Then select More Actions on bottom right hand side, and then select Exit.

Step 4

To Delete tasks that are completed



1. Select the white flag widget on the left hand side **Select My Completed Tasks** on the right hand side. Click on the box next to the Task ID number. Select the MORE tab at the top of the page then select **Delete Task**. Select **Yes** to complete confirmation. To



. To exit PSMS: Select Logged in as on the top right hand exit page select Info Center side of the page. Click on the drop down list and select Logout