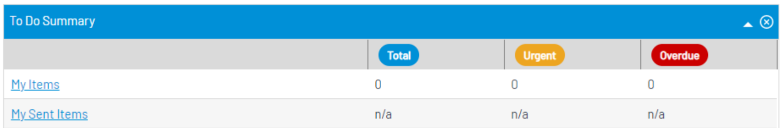
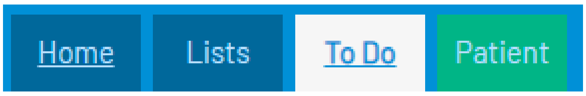
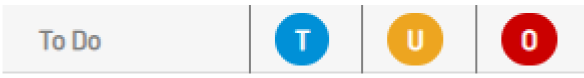
To Do List

The **To Do tab** displays tasks that have been initiated and allocated to users and groups (items assigned to you, and all items assigned to work queues to which you belong).

Work items (snippets of work) are created and passed between systems and/or people.

When a task is complete, the work item can either be closed (if complete) or sent on for further processing.

To view items in the To Do tab:

From the **Home** screen, your private work queue (**My Items**) and the shared work queues to which you have access can be accessed from the **To Do Summary** or from the **To Do** tab	 
Click on **My Items** to view work items assigned directly to you	
Click on **My Sent Items** to see the work items you have initiated	
Click on any **work queue** to see the work items assigned to that queue	
The left hand side will list the number of Total, Urgent & Overdue work items	 **T – Total** **U – Urgent** **O – Overdue**

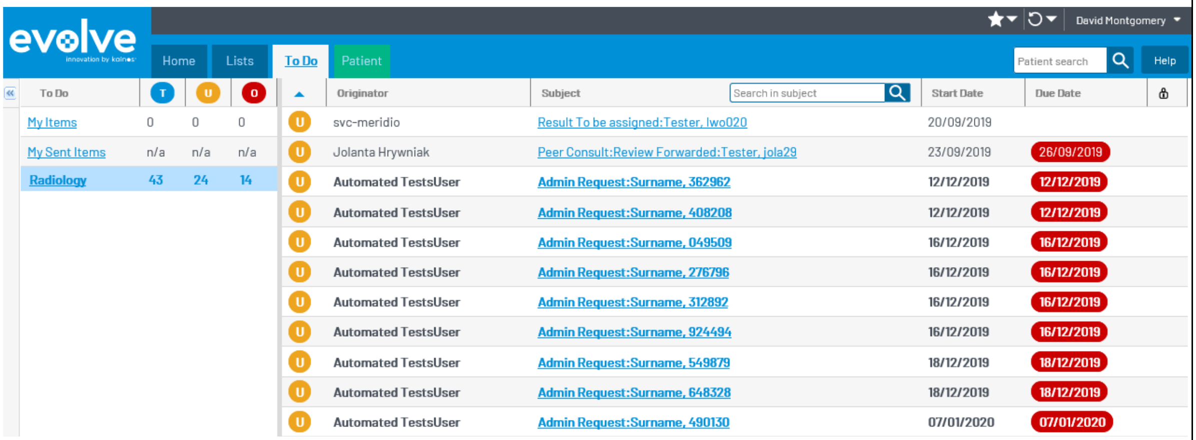
<table>
<tr><th colspan="2">To Do List</th></tr>
<tr><td colspan="2">The work items are displayed in a list, the list below explains each column in the To Do tab:

Priority - The priority of the task. The options are high (upward arrow) and low (downward arrow). R means Routine & U means Urgent.
Originator - The name of the person who created the task.
Subject - The title of the task.
Start Date - The date the task was created.
Due Date - The date by which the task must be completed. When tasks are overdue, the date is displayed in red.
Lock - Indicates whether the task is currently locked for editing and if so lists the username
</td></tr>
<tr><td colspan="2">You can search in your To Do list using any phrase in the Subject line. To search:</td></tr>
<tr><td>Enter a word or phrase from the subject line and then press the Enter key or the magnifying glass</td><td></td></tr>
<tr><td>To clear the filter, press the x</td><td></td></tr>
<tr><td>Use AND / OR operators to filter the list on multiple words, e.g. Admin OR Peer, Brown AND Diabetes</td><td>
</td></tr>
</table>

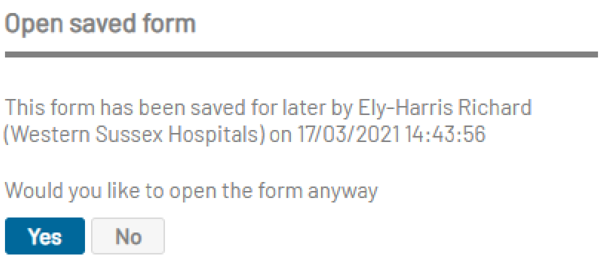
To Do List

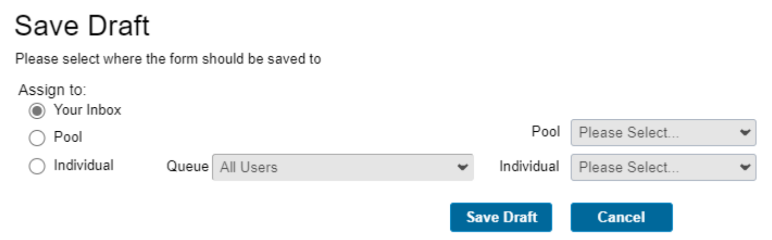
You can also **filter** a column in the **To Do** list but clicking on the title. An up or down facing arrow will show on the column when it's filtered in ascending or descending order. This filter is remembered, even when you have navigated away from the To Do list page and return.

Click any Subject line to view details of the item.



To progress a work item and **Save as Draft**:

Click on **My Items** or a **Work Queue**	
Open an item by clicking on it in the work queue	
Click **Yes**	
You cannot open a work item which is locked by another user	

To Do List	
The item will open ready for editing/reassignment as necessary	
To amend and reallocate a workflow item:	
Edit the form as necessary	
Click **Save as Draft**. A dialog box is displayed	
Reassign it to an **individual** or a **group**: Assign it in one of the following ways: 1. Select **Your Inbox** to save to your own drafts folder 2. Select **Pool**, and from the Pool dropdown list, select the relevant option. 3. Select **Individual**, and from the Queue and Individual dropdowns, select the relevant options This item is displayed in **My Items** in the **To Do Summary**, for the allocated user(s). The item will appear in the queue that you have selected in both the To Do tab and To Do Summary panel on the dashboard	
To progress a work item and **Submit**:	
Click on **My Items**	
Open an item by clicking on it in the work queue	
Edit the form as necessary	
Click on **Submit**	The newly created form will be permanently stored in the patient's case notes