How do I create a task?

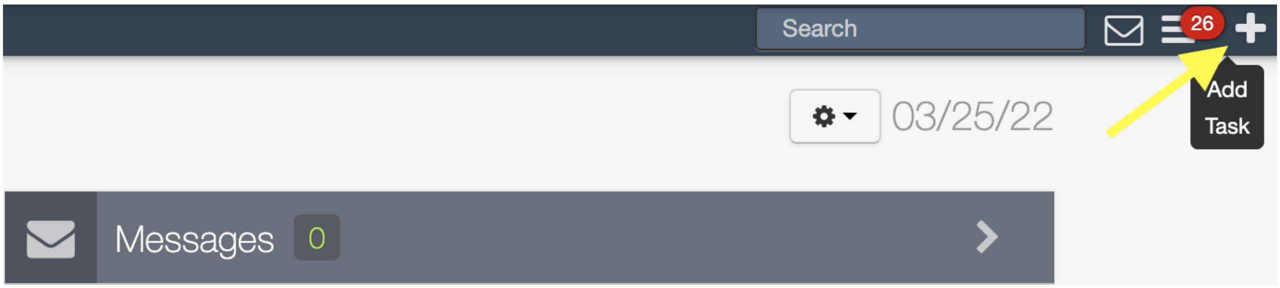
07/24/2024 3:55 pm EDT

Creating a Task in DrChrono

There are two ways to create a new task in DrChrono: through the navigation bar or through the task center.

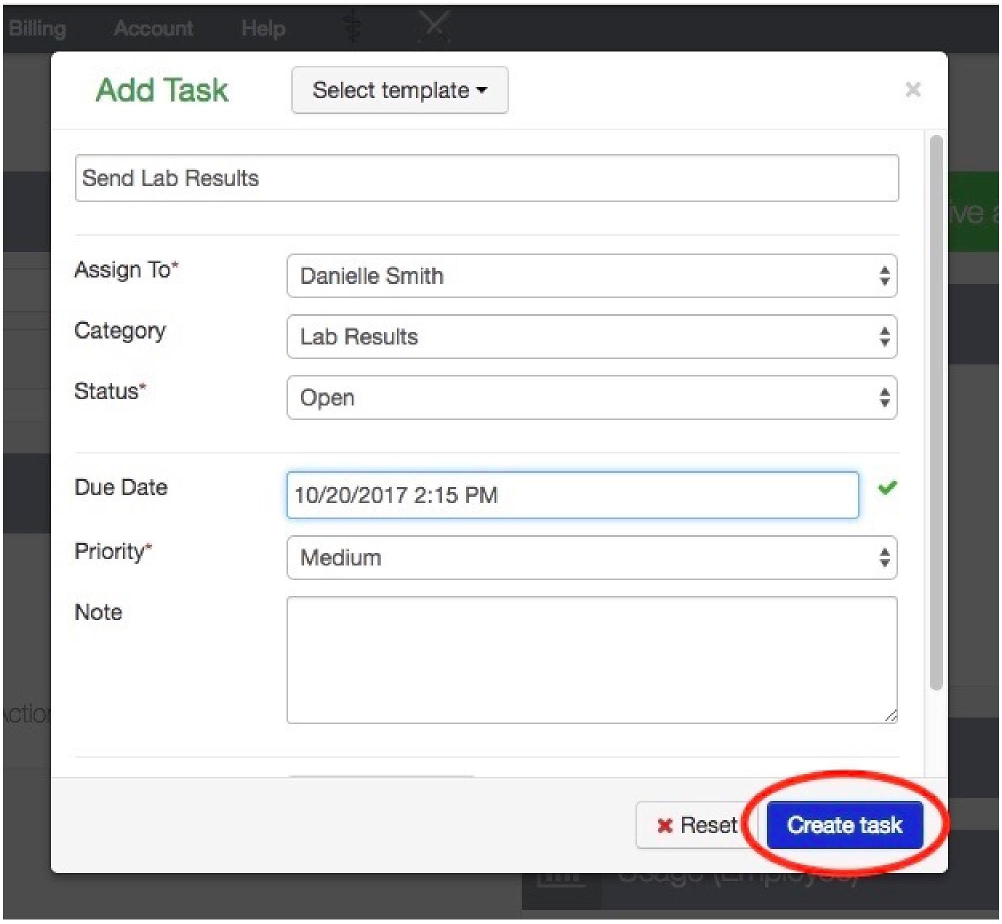
Creating a Task in the Navigation Bar

1. Click on the **+** symbol on the far right side of the top toolbar.

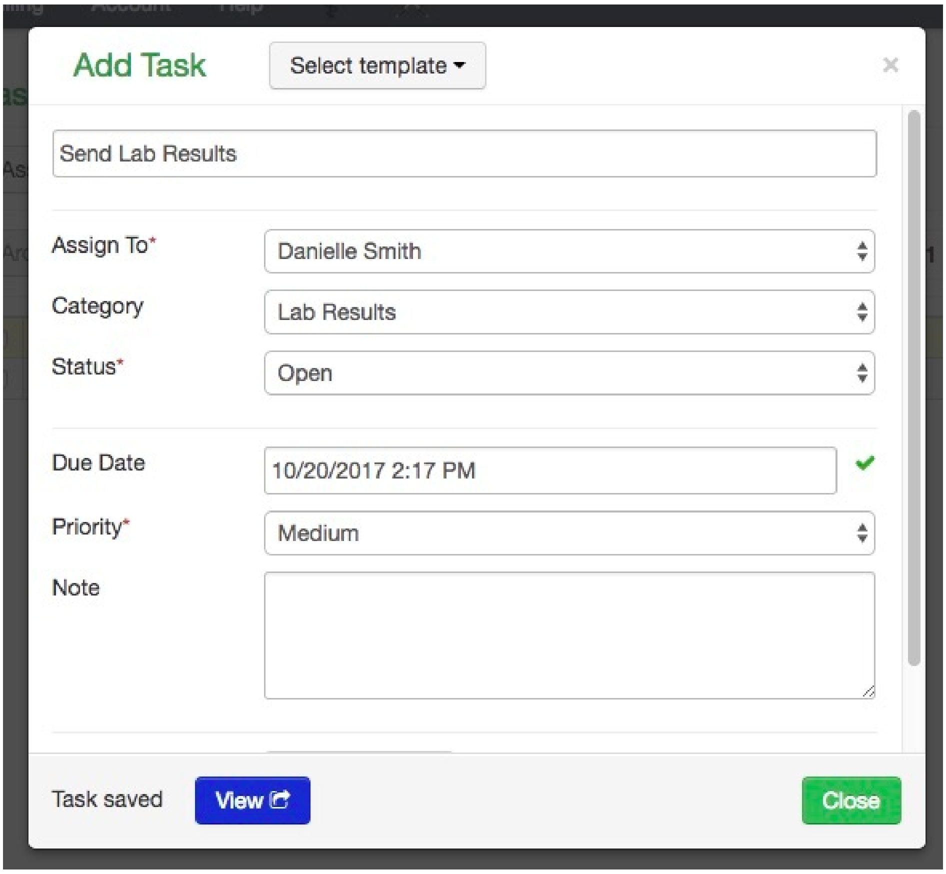


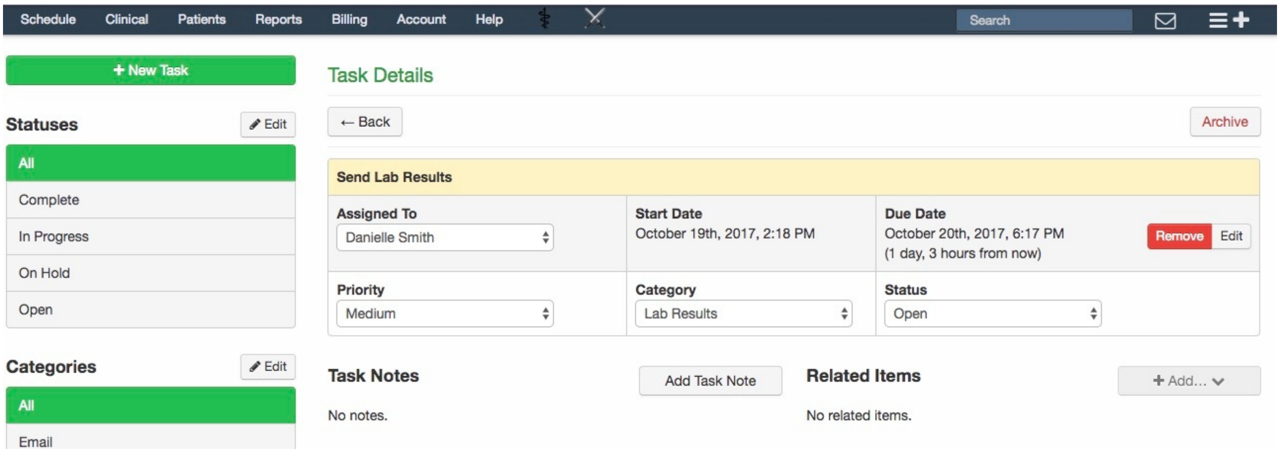
2. Fill in the required information as well as any additional details. The required fields include Task Title, Assign To, Status, and Priority.

3. Click the blue **Create task** button.



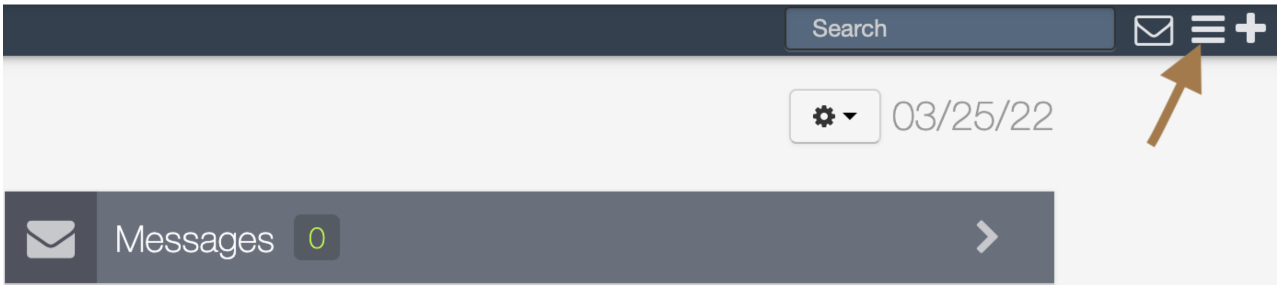
4. You can either close the window or select the **View** button which will take you to the task center and show the details of the task you just created.



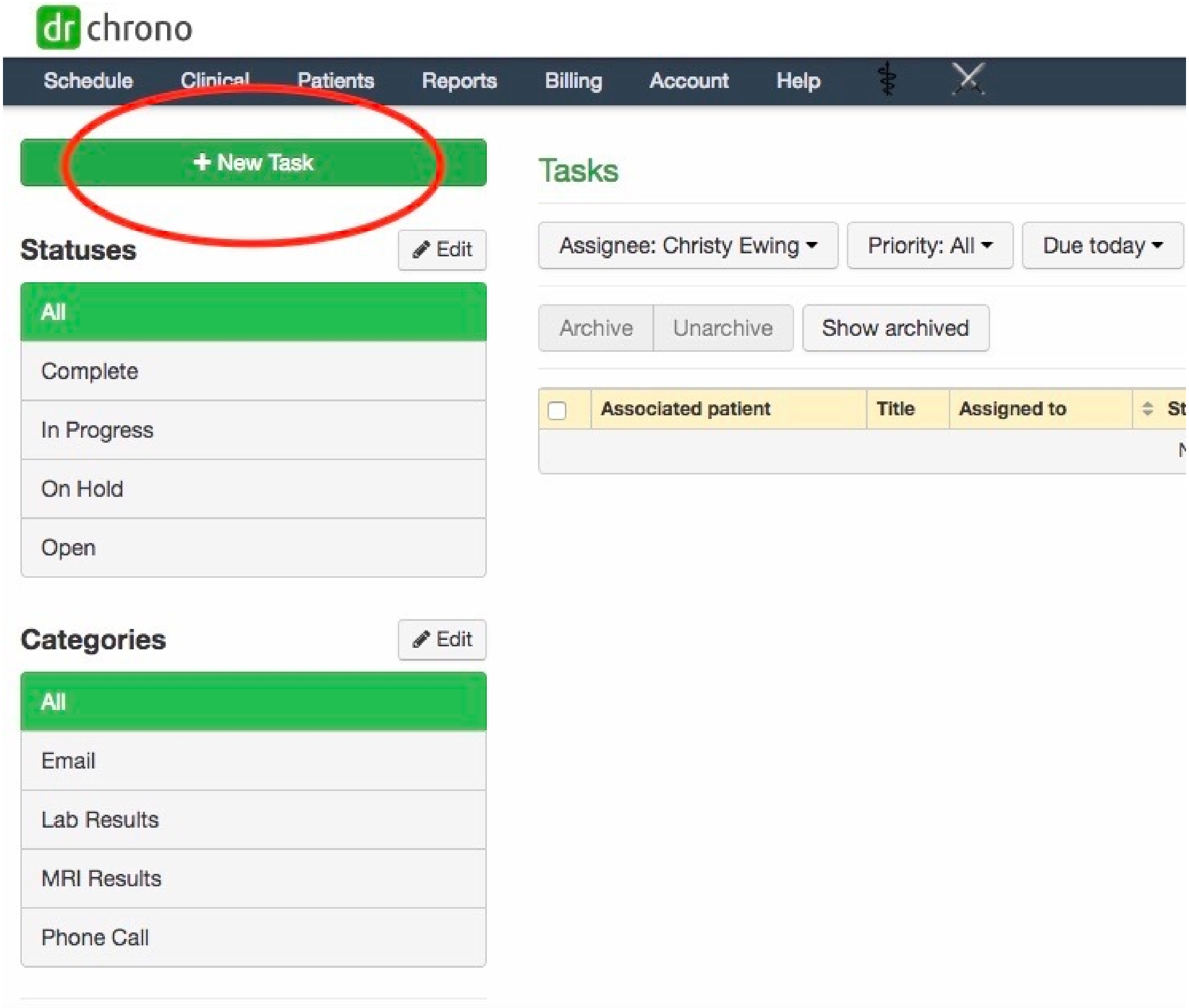


Creating a Task in the Task Center

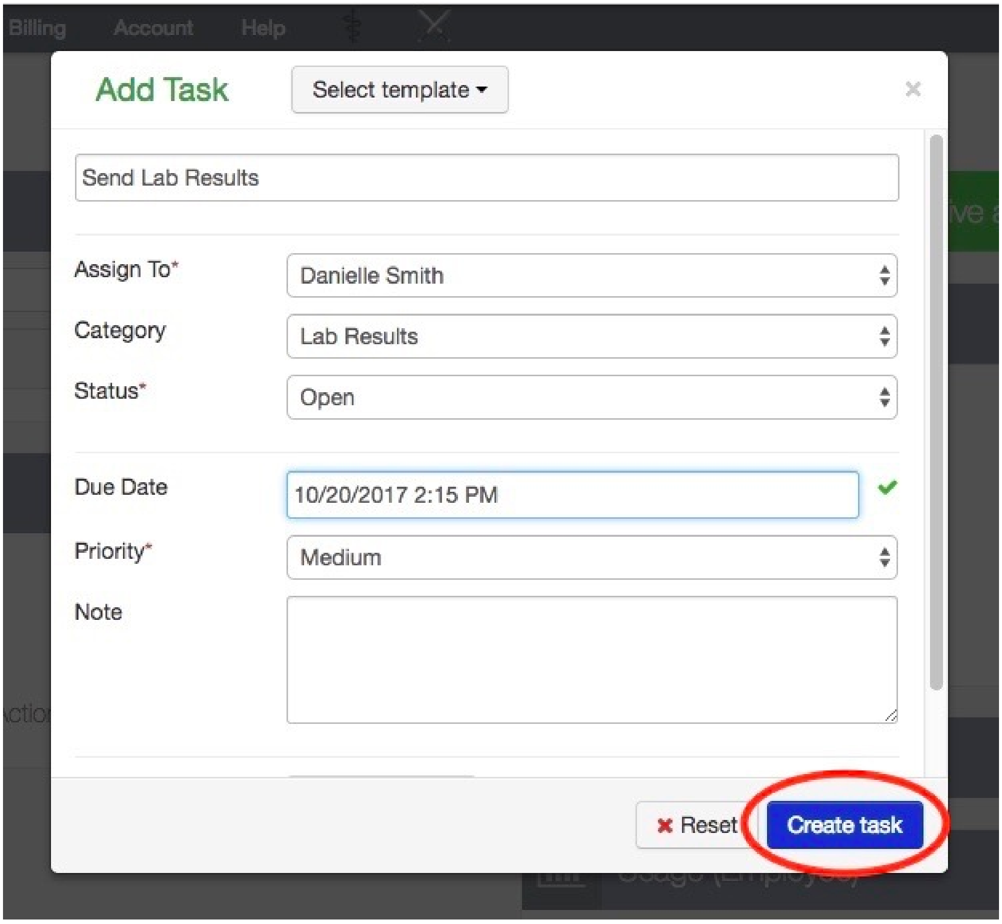
1. Click the three stacked lines on the far right side of the DrChrono dashboard to enter the task center.



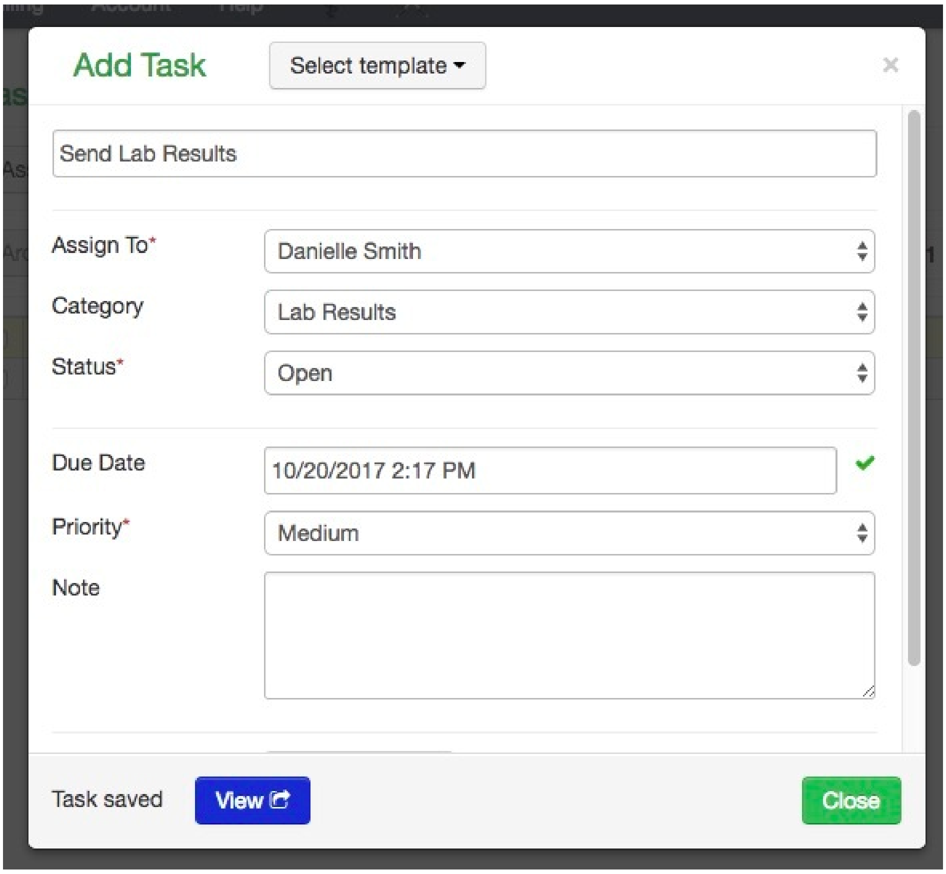
2. Select the green **New Task** button on the top left of the page.

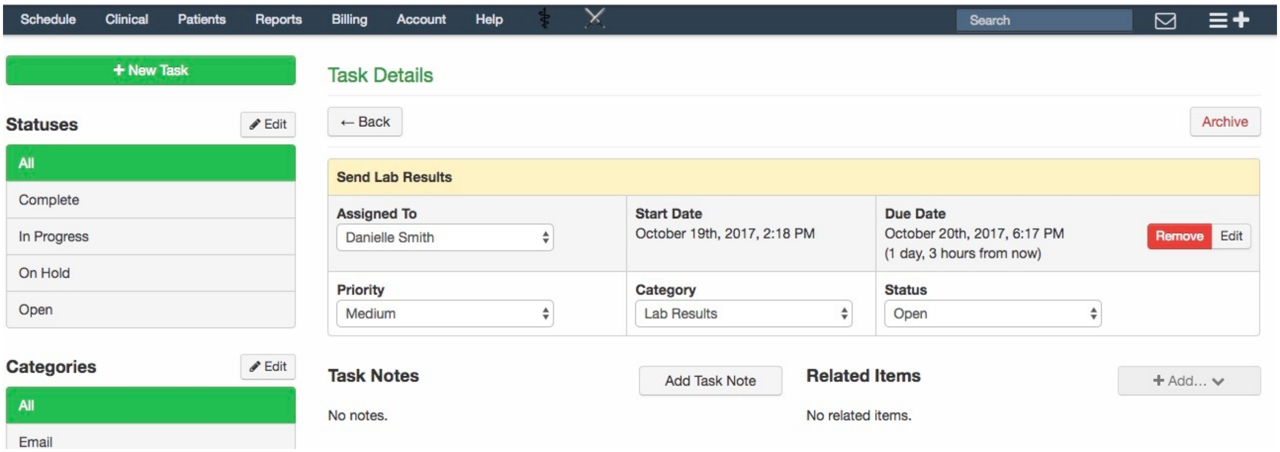


3. Fill in the required information as well as any additional details. The required fields include Task Title, Assign To, Status, and Priority. Click the blue **Create task** button.



4. You can either close the window or select the **View** button which will take you to the task center and show the details of the task you just created.




Schedule
Clinical
Patients
Reports
Billing
Account
Help
Search
+ New Task
Statuses
Edit
All
Complete
In Progress
On Hold
Open
Categories
Edit
All
Email
Task Details
← Back
Archive
Send Lab Results
Assigned To
Danielle Smith
Start Date
October 19th, 2017, 2:18 PM
Due Date
October 20th, 2017, 6:17 PM
(1 day, 3 hours from now)
Remove
Edit
Priority
Medium
Category
Lab Results
Status
Open
Task Notes
Add Task Note
No notes.
Related Items
+ Add...
No related items.