

How do I create a task?

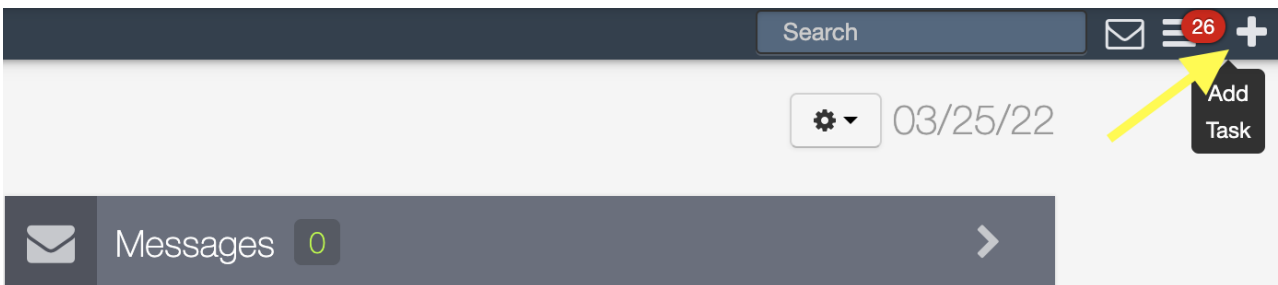
07/24/2024 3:55 pm EDT

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](#).

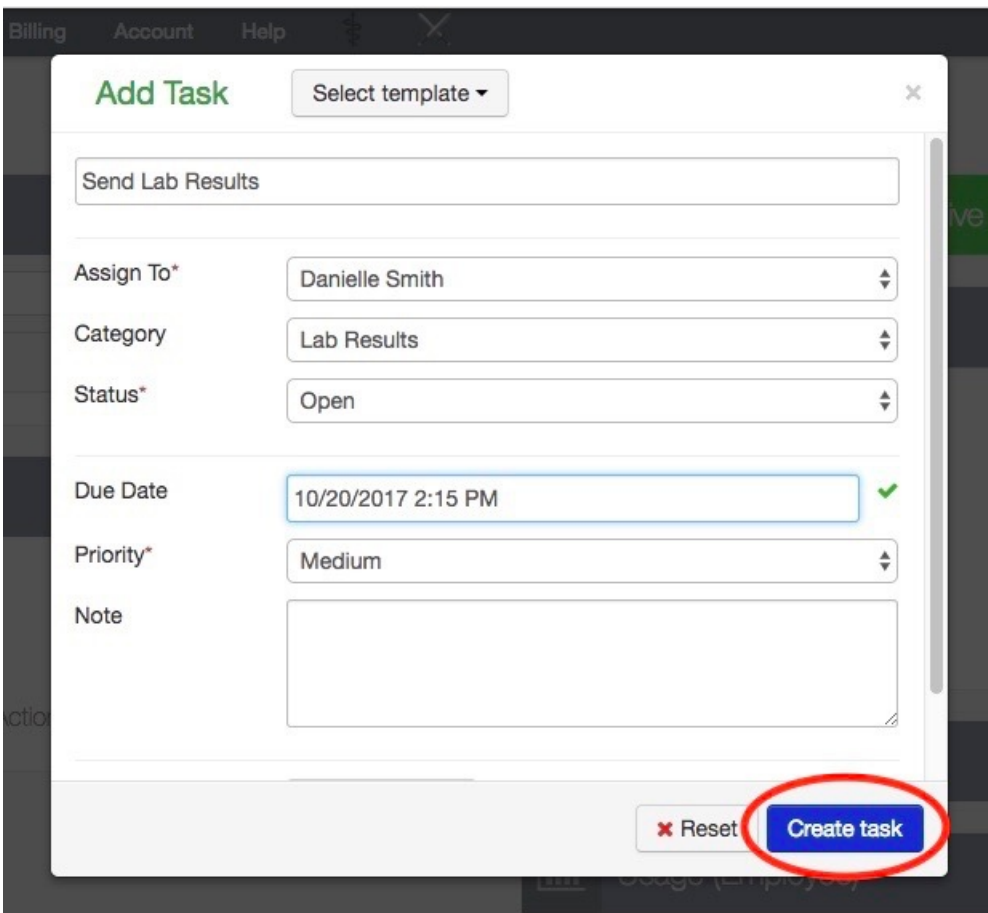
Creating a Task in the Navigation Bar

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.

Add Task Select template ▾

Send Lab Results

Assign To* Danielle Smith ▾

Category Lab Results ▾

Status* Open ▾

Due Date 10/20/2017 2:17 PM ✓

Priority* Medium ▾

Note

Task saved **View** **Close**

Schedule Clinical Patients Reports Billing Account Help Search

+ New Task Task Details Archive

← Back Edit

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 **Related Items** + Add...

No notes. No related items.

Statuses Edit

- All
- Complete
- In Progress
- On Hold
- Open

Categories Edit

- All
- Email

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.

Search

Messages 0

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

The screenshot shows the dr chrono web application interface. At the top is a dark navigation bar with menu items: Schedule, Clinical, Patients, Reports, Billing, Account, and Help. Below this is a green button labeled '+ New Task', which is circled in red. To the left of the main content are two filter sections: 'Statuses' and 'Categories', each with an 'Edit' button. The 'Statuses' list includes 'All', 'Complete', 'In Progress', 'On Hold', and 'Open'. The 'Categories' list includes 'All', 'Email', 'Lab Results', 'MRI Results', and 'Phone Call'. The main 'Tasks' section features a header with filters: 'Assignee: Christy Ewing', 'Priority: All', and 'Due today'. Below these are 'Archive', 'Unarchive', and 'Show archived' buttons. At the bottom is a table with columns: a checkbox, 'Associated patient', 'Title', 'Assigned to', and 'St'.

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.

Billing Account Help

Add Task

Select template ▾

Send Lab Results

Assign To* Danielle Smith ▾

Category Lab Results ▾

Status* Open ▾

Due Date 10/20/2017 2:15 PM ✓

Priority* Medium ▾

Note

✕ Reset Create task

A screenshot of a web application's 'Add Task' dialog box. The dialog has a title bar with 'Add Task' and a close button. Below the title bar is a 'Select template' dropdown menu. The main content area contains several form fields: a text input with 'Send Lab Results', three dropdown menus for 'Assign To*' (Danielle Smith), 'Category' (Lab Results), and 'Status*' (Open), a date and time input for 'Due Date' (10/20/2017 2:15 PM) with a green checkmark, a dropdown for 'Priority*' (Medium), and a text area for 'Note'. At the bottom right, there are two buttons: '✕ Reset' and 'Create task'. The 'Create task' button is highlighted with a red circle.

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.

Add Task

Select template ▾

Send Lab Results

Assign To* Danielle Smith ▾

Category Lab Results ▾

Status* Open ▾

Due Date 10/20/2017 2:17 PM ✓

Priority* Medium ▾

Note

Task saved View ↗ Close

A screenshot of the same 'Add Task' dialog box, but now it shows the task has been successfully created. The 'Due Date' is now 10/20/2017 2:17 PM. At the bottom left, the text 'Task saved' is displayed. At the bottom center, there is a blue 'View' button with an external link icon. At the bottom right, there is a green 'Close' button.

[+ New Task](#)

Task Details

Statuses [Edit](#)

- All
- Complete
- In Progress
- On Hold
- Open

Categories [Edit](#)

- All
- Email

[← 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.