How do I create a task status?

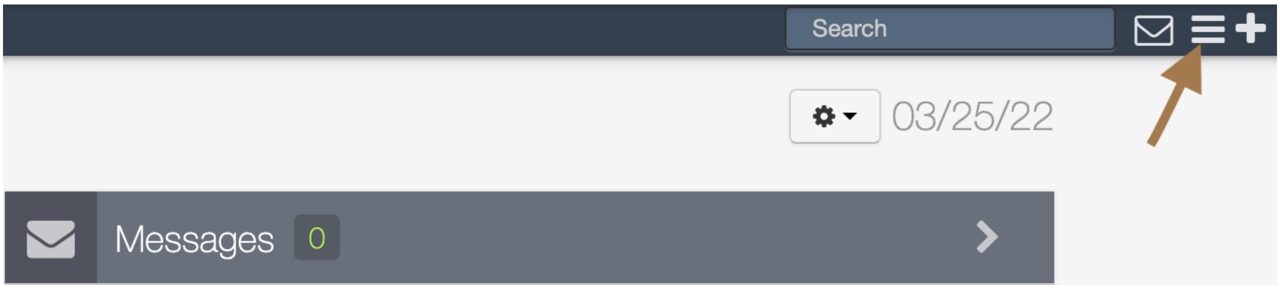
07/24/2024 3:55 pm EDT

Task statuses are a great way for your practice to organize the task management workflow in the task center. Each task status is specific to a task category.

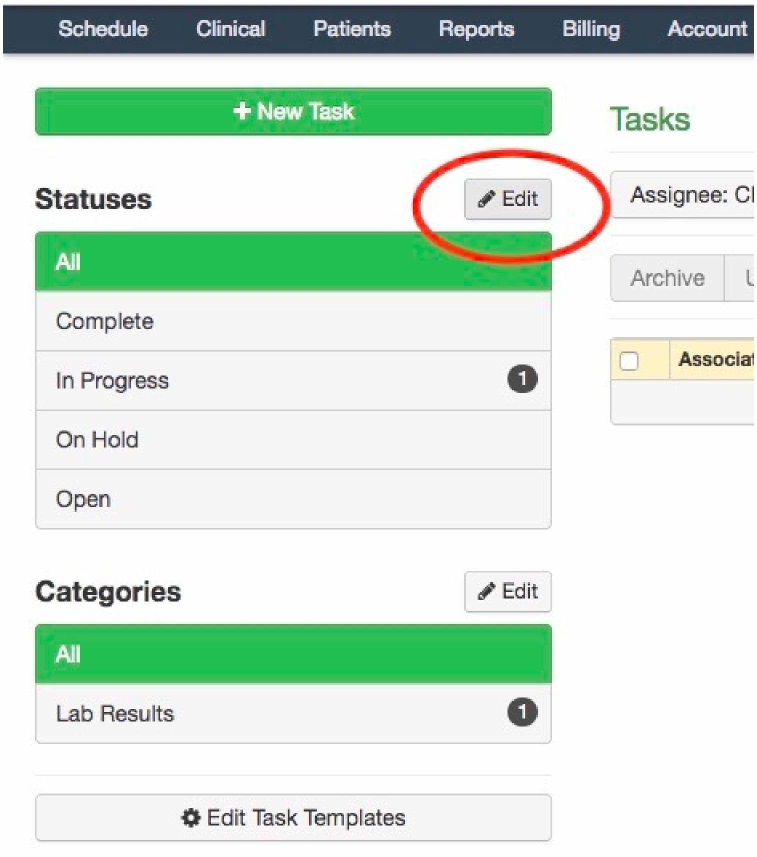
For example: If you create the status **Verified** under the category **Lab Results** that status will only appear when “Lab Results” is selected as the category when creating a new task. The status “Verified” will not be available in the drop-down for any other task category except "Lab Results.”

1. Click on the three stacked lines (

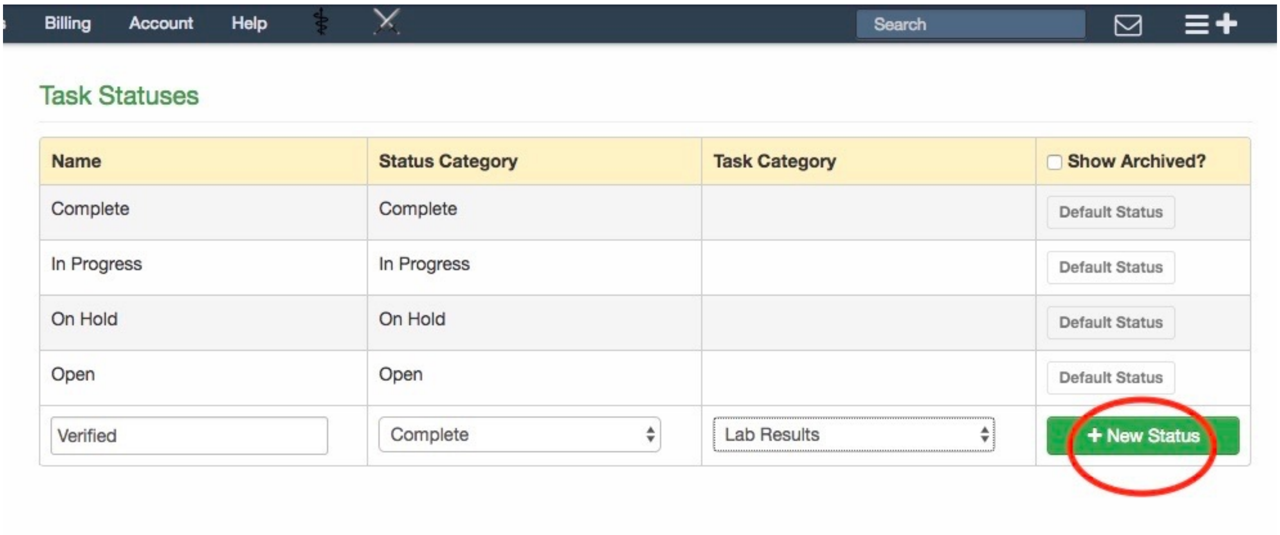
) on the far right side to enter the task center.



2. Click the **Edit** button next to Statuses on the far left of the page.



3. Enter the fields for status name, status category, and task category. Once completed, click the green **+ New Status** button.


Billing
Account
Help
Search
Task Statuses
Name
Status Category
Task Category
Show Archived?
Complete
Complete
Default Status
In Progress
In Progress
Default Status
On Hold
On Hold
Default Status
Open
Open
Default Status
Verified
Complete
Lab Results
+ New Status