How do I change the status of a task?

07/24/2024 3:50 pm EDT

Once you complete a task or need to change the status for any reason, please either click directly on the task itself, or on the blue pencil icon (

towards the right of the screen.

You'll see this screen:

Schedule Clinical Patient	s Reports	Billing Account Help 🍃 🔀		Search	_ ⊵ ≡ •
+ New Task		Task Details			
tatuses	& Edit	← Back			Archiv
All		test			
Complete In Progress		Assigned To Dane Rasmuson	Start Date October 18th, 2017, 9:06 AM	Due Date October 20th, 2017, 1:06 PM (2 days, 3 hours from now)	Remove Edi
On Hold		Priority	Category	Status	
Open	4	Medium \$	Review Blood Work	Open \$	
categories		Task Notes	Add Task Note Related	d Items	+ Add ∨
All		No notes.	No related	d items.	
Lab Results	0		1010101		
Patient Call	0				
Review Blood Work	0				
Schedule Review					
Test					

As you can see, the status of the task is 'Open'. To change that, simply utilize the **Status** dropdown menu to change it from 'Open' to 'Complete' for example.

Schedule Clinical Patie	nts Reports	Billing Account Help	X	Search	2 ≡+
+ New Task		Task Details			
tatuses	& Edit	← Back			Archive
All		test			
Complete In Progress	0	Assigned To Dane Rasmuson \$	Start Date October 18th, 2017, 9:06 AM	Due Date October 20th, 2017, 1:06 PM (2 days, 3 hours from now)	Remove Edit
On Hold Open	8	Priority Medium	Category Review Blood Work \$	Status Complete	
ategories	Security Edit	Task Notes	Add Task Note Relate	ed Items	+ Add ∨
All		No notes.	No relate	ed items.	
Lab Results	2				
Patient Call	0				
Review Blood Work	0				
Schedule Review					
Test					

If you go back to the task center homepage, you'll notice the 'Review Blood Work' category's status is now 'Complete'. You have the option of selecting either Open, On Hold, In Progress, or Complete.

Schedule Clinical Patie	ents Reports	Billing	Account Hel	p	×				Search		≡+
+ New Task		Tasks									
tatuses	Se Edit	Assign	ee: All 👻 Pri	ority: All	- All due da	ates -				Reset	(filter
All		Archive	e Unarchive	Sho	w archived				1–4 OF 4	Search tasks	C
Complete	0										
In Progress		Asso	ciated patient	Title test	Assigned to Dane Rasmuson	Status Complete	Category Review Blood Work	Priority Medium	Start date October 18th, 2017, 9:06 AM	Due date October 20th, 2017, 1:06 PM	
On Hold				test	Dane Rasmuson	Open	Patient Call	Medium	October 18th, 2017, 9:06 AM	, , ,	
Open	3			test 2	Dane Rasmuson	Open	Lab Results	High	October 18th, 2017, 9:05 AN	October 19th, 2017, 1:05 PM	
	•			Task 1	Dane Rasmuson	Open	Lab Results	High	October 18th, 2017, 8:04 AM	October 20th, 2017, 12:30 PM	1
Categories	& Edit										
All											
Lab Results	0										
Patient Call	0										
Review Blood Work	0										
Schedule Review											
Test											

To view how to create a category, please click here.