

How do I create a task category?

07/24/2024 3:55 pm EDT

Creating a task category is a breeze with DrChrono's task system. This functionality allows greater customization and control when assigning tasks throughout the office. These categories organize an individual's task inbox for easier visibility of what needs to be done.

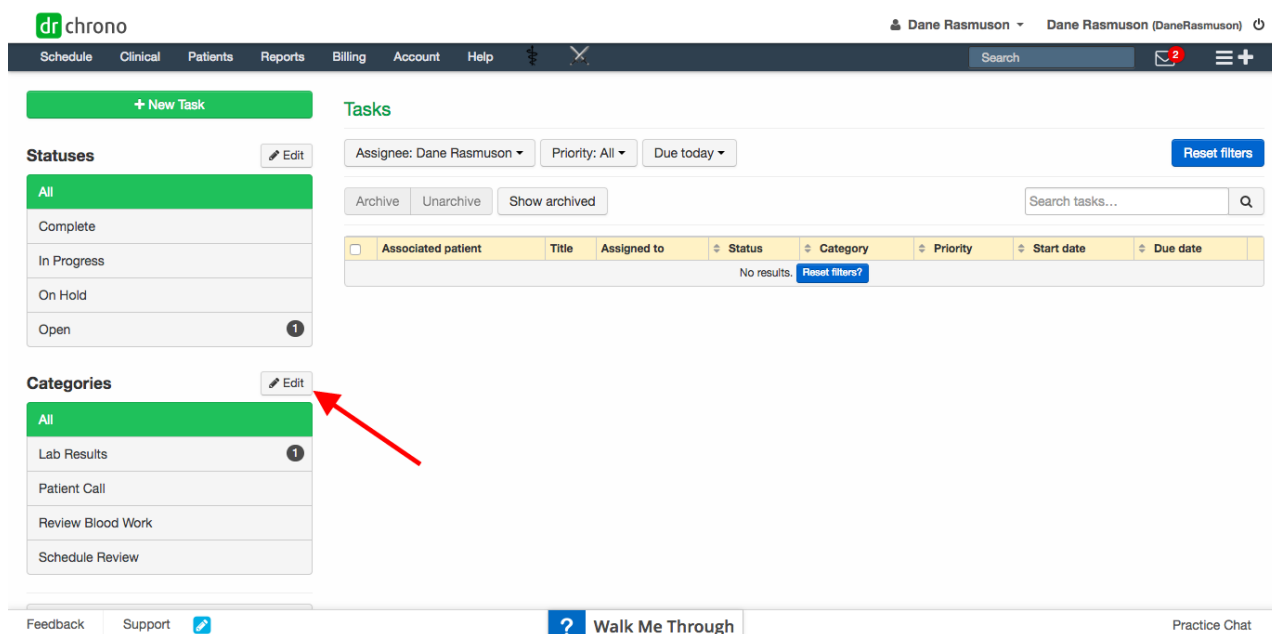
1. Please access the task center (



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2. Once in the task center, please click the **Edit** button on the left-hand side of the screen, next to Categories.



The screenshot shows the DrChrono task center interface. The top navigation bar includes the DrChrono logo, user name 'Dane Rasmuson', and various menu items like Schedule, Clinical, Patients, Reports, Billing, Account, and Help. The main content area is divided into a left sidebar and a main task list. The sidebar has a '+ New Task' button and sections for 'Statuses' and 'Categories'. The 'Categories' section has an 'Edit' button highlighted with a red arrow. The main task list has filters for Assignee, Priority, and Due date, and a search bar. The task list table has columns for Associated patient, Title, Assigned to, Status, Category, Priority, Start date, and Due date. The current view shows 'No results'.

3. To create a new category, simply type the name of the desired category and click **+New Category**. You're also able to remove unwanted categories by clicking the **Archive** button on the right side of the page.

Global Status Column

Yes = System-created category available to everyone and not editable/archivable.

No = User-created category, able to be edited or archived.

The screenshot shows the 'Task Categories' management interface. On the left, there are two lists: 'Statuses' and 'Categories'. The 'Task Categories' table lists existing categories like 'Lab Results', 'Patient Call', 'Review Blood Work', and 'Schedule Review'. A new category 'Test' is being added at the bottom, indicated by a green '+ New Category' button.

Name	Global Status?	
Lab Results	Yes	
Patient Call	No	Archive
Review Blood Work	No	Archive
Schedule Review	No	Archive
Test		+ New Category

4. When assigning tasks, you can select a specific category on this screen.

The screenshot shows the 'Add Task' modal form. A red arrow points to the 'Category' dropdown menu, which currently shows '-- Select Category --'. The form also includes fields for 'Task Title (required)', 'Assign To', 'Status' (set to 'Open'), 'Due Date', 'Priority' (set to 'Medium'), and a 'Note' text area. At the bottom, there are 'Reset' and 'Create task' buttons.

Selecting task categories keeps tasks organized, as you can see here, tasks are organized by category.

+ New Task

Statuses

Edit

- All
- Complete
- In Progress
- On Hold
- Open (4)

Categories

Edit

- All
- Lab Results (2)
- Patient Call (1)
- Review Blood Work (1)
- Schedule Review
- Test

Tasks

Assignee: Dane Rasmuson Priority: All Due today

Reset filters

Archive Unarchive Show archived

Search tasks... [search icon]

<input type="checkbox"/>	Associated patient	Title	Assigned to	Status	Category	Priority	Start date	Due date
No results. Reset filters?								