

Creating a Task on the iPhone

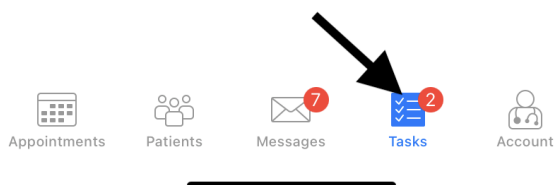
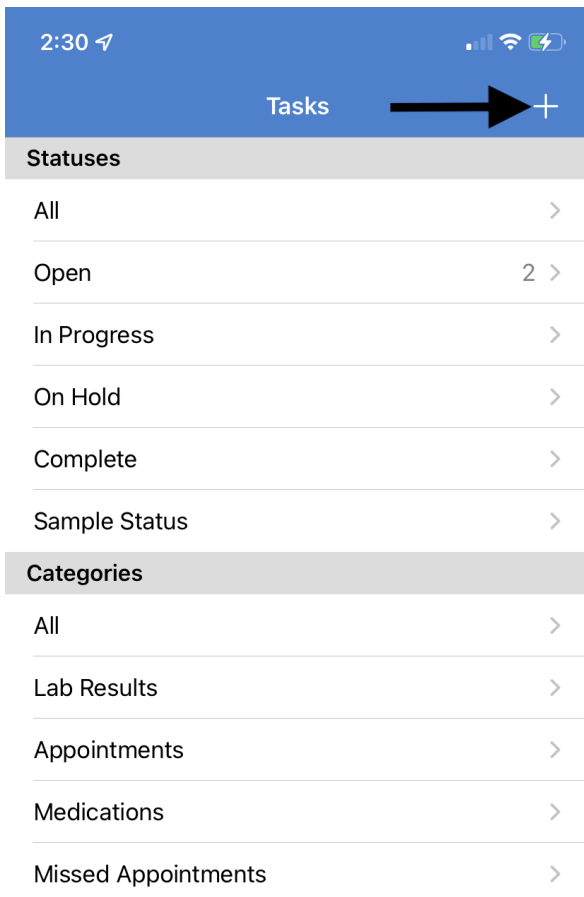
07/24/2024 1:30 pm EDT

Creating a task on the iPhone is easy and convenient. Tasks can be created in the task center or from the patient's chart.

You can access the task center on the lower toolbar of the app by tapping the **Tasks** button. Tap the (



) to add a new task.



You can create the task manually by:

- Entering a title
- Selecting the assignee
- Status
- Due date

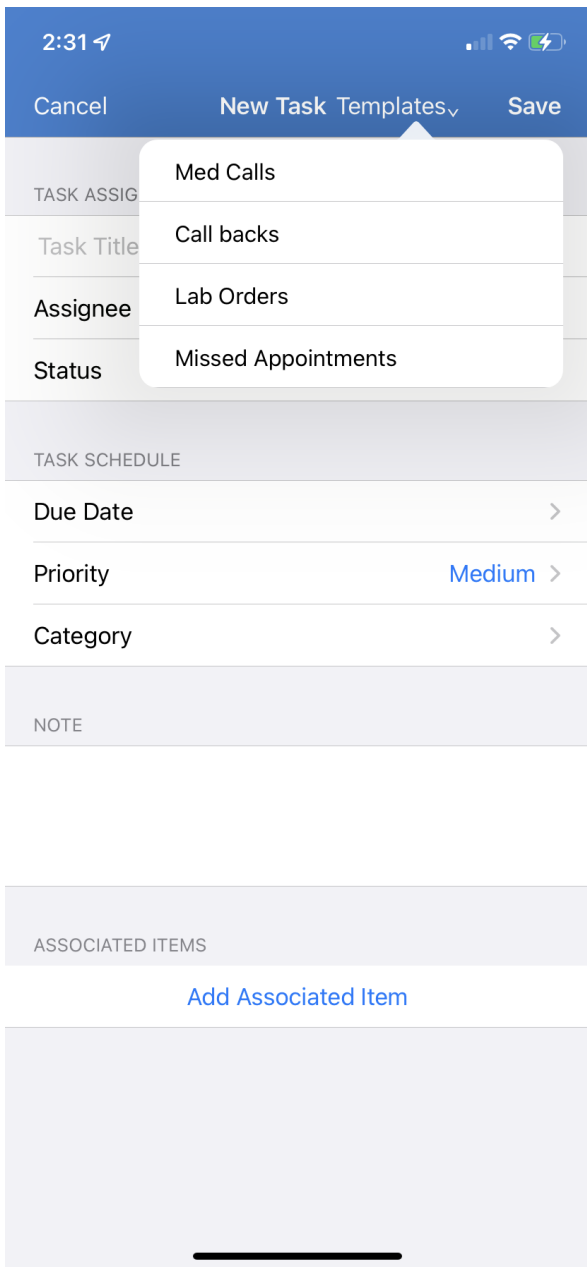
- Priority
- Category

The screenshot shows a mobile application interface for creating a task. At the top, there is a blue header bar with the time '2:30', a back arrow, and status icons for signal, Wi-Fi, and battery. Below the header are three buttons: 'Cancel', 'New Task Templates' (with a dropdown arrow), and 'Save'. The form is divided into several sections, each with a light gray header:

- TASK ASSIGNMENT:** Contains fields for 'Task Title', 'Assignee' (with a right arrow), and 'Status' (with 'Open' and a right arrow).
- TASK SCHEDULE:** Contains fields for 'Due Date' (with a right arrow), 'Priority' (with 'Medium' and a right arrow), and 'Category' (with a right arrow).
- NOTE:** A large empty text area for adding notes.
- ASSOCIATED ITEMS:** A section with a blue link 'Add Associated Item' and a large empty area below it.

A black horizontal bar is visible at the bottom of the screen, indicating a mobile device.

If you have a [task template](#) you have created on the web, you can select it from the menu.



Select **Add Associated Item** to add a patient and/or document.

2:31 📶 🔋

Cancel New Task Templates ▾ Save

TASK ASSIGNMENT

Lab Orders

Assignee Lab Tech >

Status Open >

TASK SCHEDULE

Due Date 05/12/2022 at 03:31 PM ✕

Priority High >

Category Lab Results ✕

NOTE

Please review patient note and run necessary tests.

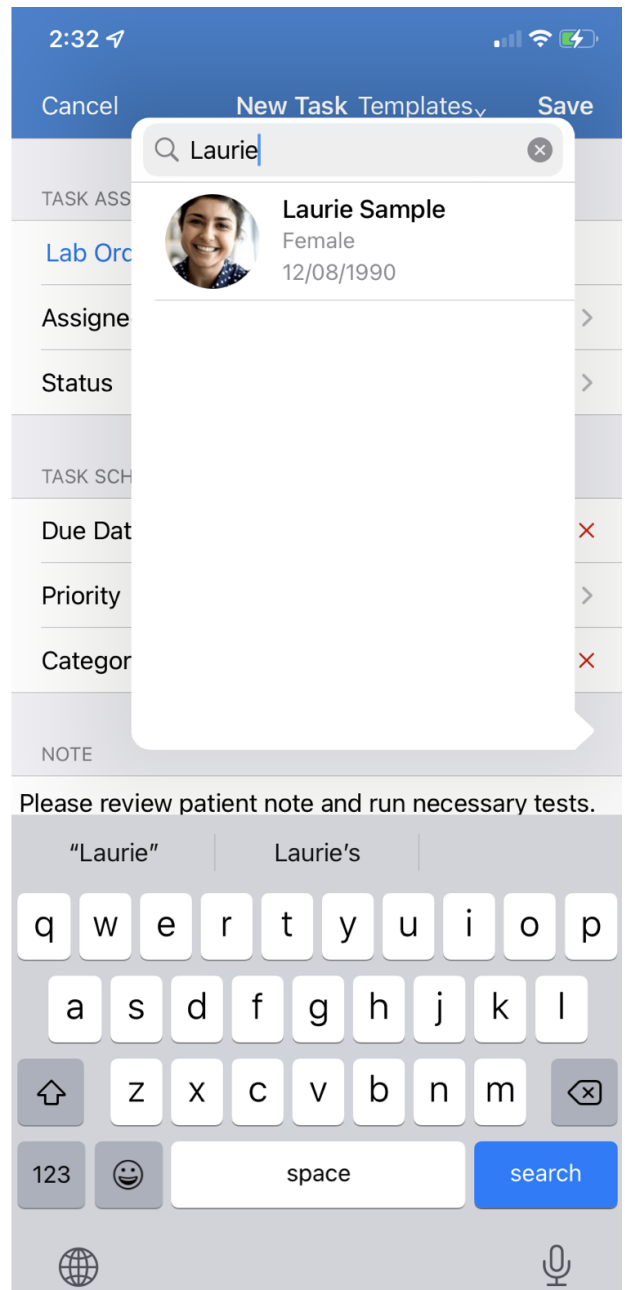
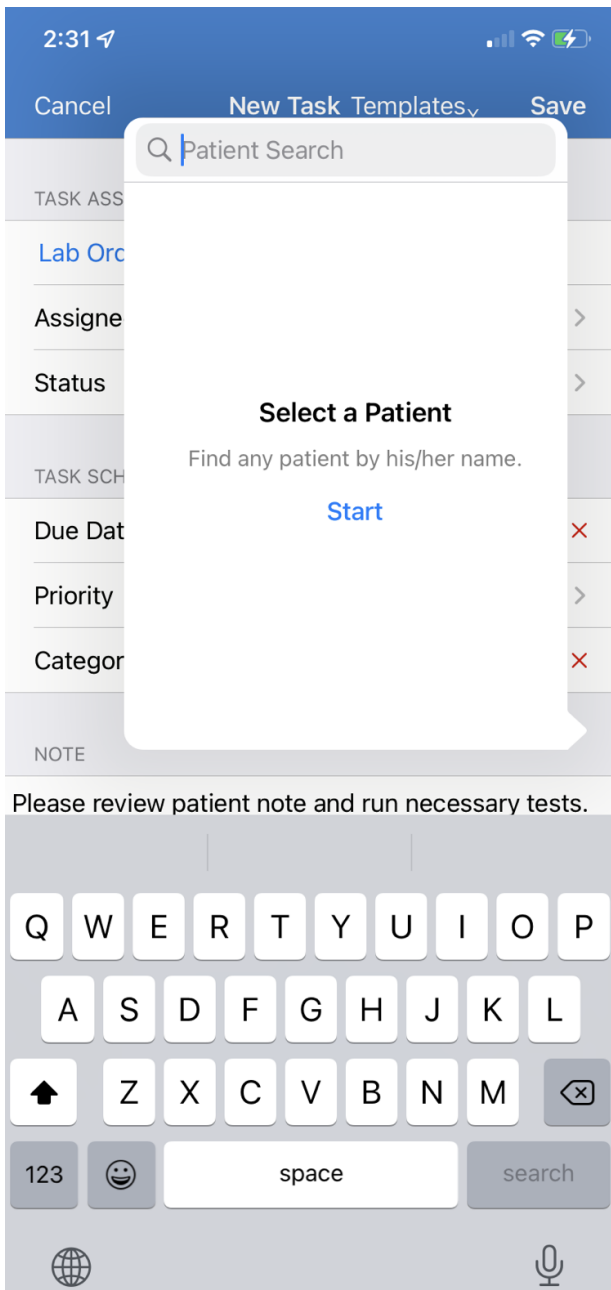
ASSOCIATED ITEMS

Add Associated Item

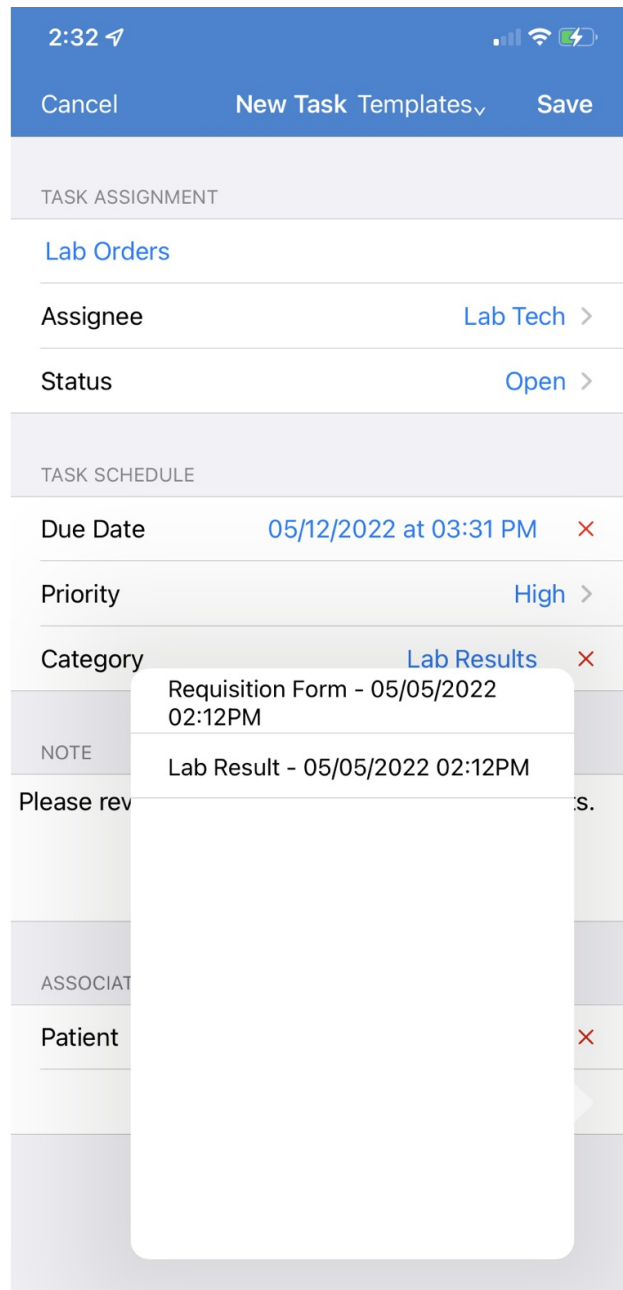
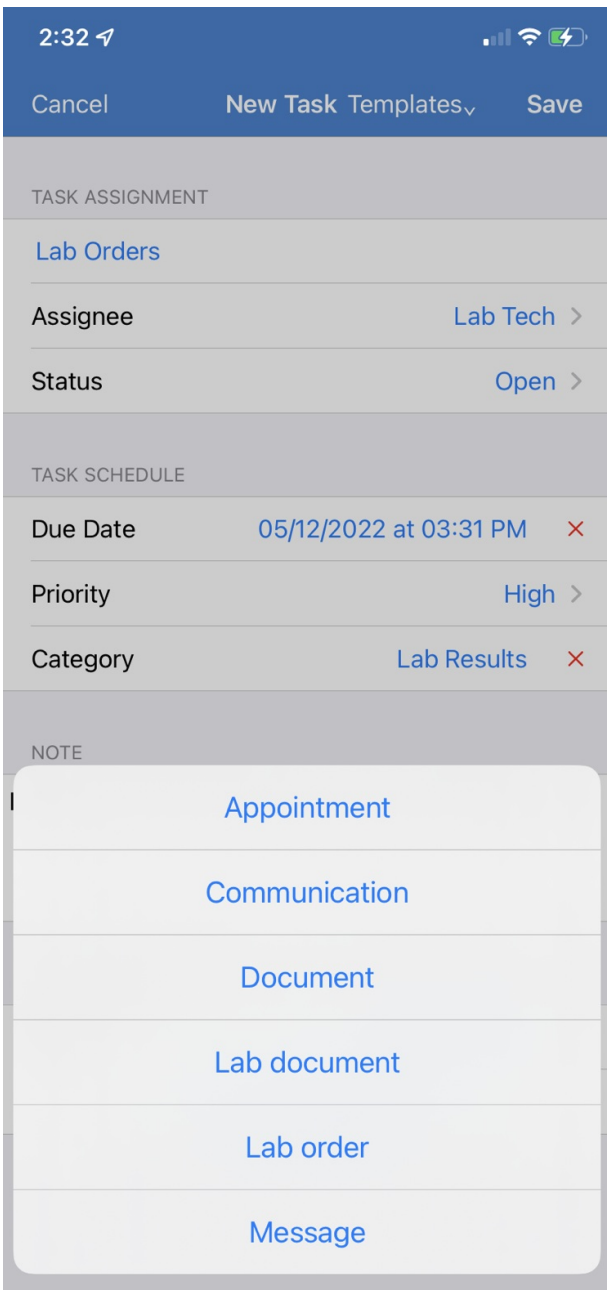
Patient

Message

Search for the patient you would like to make the task for.



If needed, you can select an item from the patient's history to attach to the tasks.



Tap **Save** when finished. You will see a green success message on the top.

2:32

Cancel New Task Templates ▾ **Save**

TASK ASSIGNMENT

[Lab Orders](#)

Assignee [Lab Tech](#) >

Status [Open](#) >

TASK SCHEDULE

Due Date [05/12/2022 at 03:31 PM](#) ✕

Priority [High](#) >

Category [Lab Results](#) ✕

NOTE

Please review patient note and run necessary tests.

ASSOCIATED ITEMS

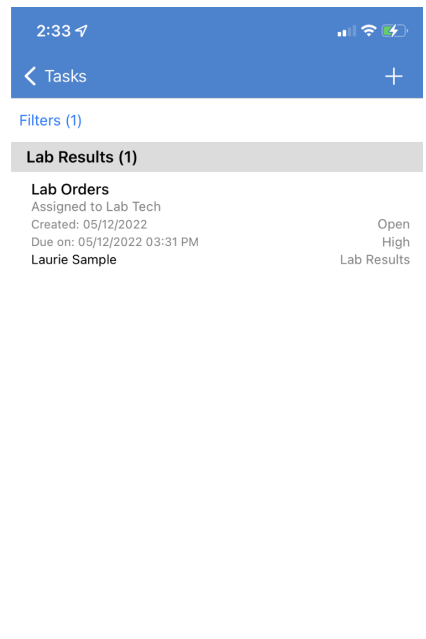
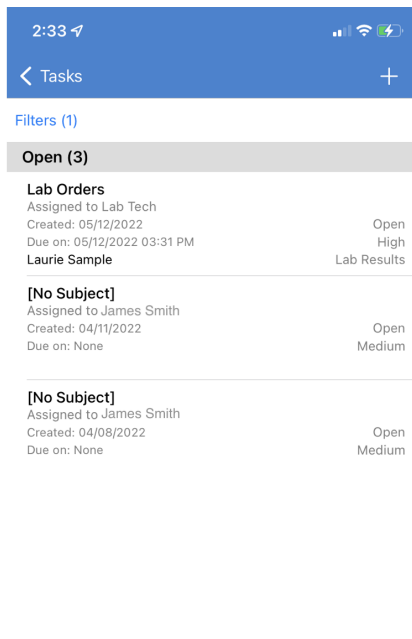
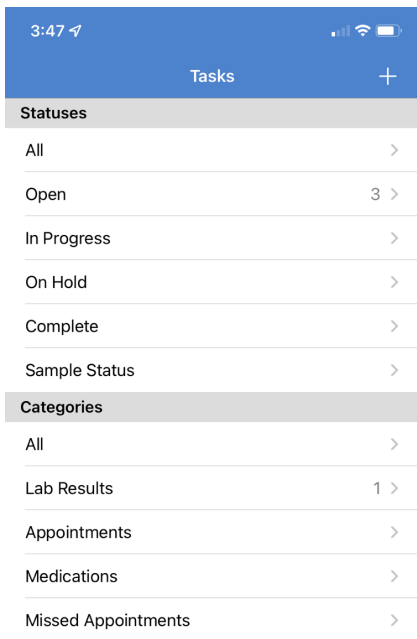
Patient [Laurie Sample](#) ✕

Lab Document [Lab Result - 05/05/2022 02:12PM](#) ✕

[Add Associated Item](#)

- 2:32
- Tasked saved
- Tasks +
- Statuses**
- All >
 - Open 3 >
 - In Progress >
 - On Hold >
 - Complete >
 - Sample Status >
- Categories**
- All >
 - Lab Results 1 >
 - Appointments >
 - Medications >
 - Missed Appointments >
- Appointments Patients Messages 7 **Tasks** 3 Account

Once the task is created, you can access it from the main menu by selecting status or category.



If you have already selected an appointment, tap the menu (



) from the appointment details screen or clinical note and select **Create Task**. The patient's name and current appointment will already be associated with the task.

2:34

Back

Laurie Sample
Female 31
12/08/1990

Super Bill Vitals

Start Visit

Appointment Details
05/12 09:15AM, 30 minutes

Appointment Profile >
Appointment Status >
Appointment Status History >

New Appointment
New Video Visit
Create Task
Reschedule / Edit Appointment
Delete Appointment

Cancel

2:34

Close

H&P / Copy Other Note
Create Task
Cache Billing Code Search
CC / History of Present Illness
Med / Fam / Social History
Review of System
Physical Exam
Assessment
Plan

SOAP
Subjective
Objective
Assessment
Plan

Billing
ICD-10 Codes
Billing

View Complete Note

2:35

Cancel New Task Templates Save

TASK ASSIGNMENT

Task Title
Assignee >
Status Open >

TASK SCHEDULE

Due Date >
Priority Medium >
Category >

NOTE

ASSOCIATED ITEMS

Patient	Laurie Sample	X
Appointment	05/12/2022 09:15 AM	X

Add Associated Item