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.

2:30 1		.11 🕈 🚱
	Tasks	+
Statuses		
All		>
Open		2 >
In Progress		>
On Hold		>
Complete		>
Sample Status		>
Categories		
All		>
Lab Results		>
Appointments		>
Medications		>
Missed Appointme	ents	>



You can create the task manually by:

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

- Priority
- Category

2:30 🗸		. I ? 💋
Cancel	New Task Templates,	Save
TASK ASSIGNMENT		
Task Title		
Assignee		>
Status		Open >
TASK SCHEDULE		
Due Date		>
Priority	N	ledium >
Category		>
NOTE		

ASSOCIATED ITEMS

Add Associated Item

If you have a task template you have created on the web, you can select it from the menu.

2:31 <i>-</i> 7	•III 🗢 🚱
Cancel	New Task Templates _√ Save
TASK ASSIG	Med Calls
Task Title	Call backs
Assignee	Lab Orders
Status	Missed Appointments
TASK SCHEDU	JLE
Due Date	>
Priority	Medium >
Category	>
NOTE	

ASSOCIATED ITEMS

Add Associated Item

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

2:31 <i>4</i>	. II 🗢 🚱
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 pati	ent note and run necessary tests.
ASSOCIATED ITEMS	
Ad	dd Associated Item
	Patient
	Message

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

2:31 /	.ıl 🗢	5 ,	2:32 A 🕈 🖸	Ð
Cancel	New Task Templates, Sa	ave	Cancel New Task Templates, Sav	re
C	Patient Search		Q Laurie	
TASK ASS			TASK ASS	
Lab Orc			Lab Orc 12/08/1990	
Assigne		>	Assigne	>
Status		>	Status	>
	Select a Patient Find any patient by his/her name.			
TASK SCH	Start		TASK SCH	
Due Dat	otart	×	Due Dat	×
Priority		>	Priority	>
Categor		×	Categor	×
NOTE			NOTE	
Please review	patient note and run necessary te	sts.		s.
			"Laurie" Laurie's	
QWE	RTYUIO	Р	qwertyuio	р
AS	DFGHJK	L	asdfghjkl	
▲ Z	XCVBNM	\bigotimes		×
123	space	ch	123 😂 space search	
	ý	2	⊕	

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

2:32 🗗	•11	? •	2:32 🗸	ni s
Cancel	New Task Templates _∨	Save	Cancel	New Task Templates $_{\vee}$
TASK ASSIGNME	NT		TASK ASSIGN	MENT
Lab Orders			Lab Orders	3
Assignee	Lab Te	ech >	Assignee	Lab Te
Status	Oţ	oen >	Status	Ор
TASK SCHEDULE			TASK SCHEDU	JLE
Due Date	05/12/2022 at 03:31 PM	1 ×	Due Date	05/12/2022 at 03:31 PM
Priority	н	ligh >	Priority	Hi
Category	Lab Results	s ×		Lab Results Requisition Form - 05/05/2022 02:12PM
NOTE			NOTE	Lab Result - 05/05/2022 02:12PM
	Appointment		Please rev	
	Communication			
	Document		ASSOCIAT	
	Lab document		Patient	
	Lab order			
	Message			

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

2:32 🕫	• II 🕏		
Cancel	New Task Templates	ave	
			S
TASK ASSIGNMEN	T		A
Lab Orders			C
Assignee	Lab Tec	h >	-
Status	Ope	n >	(
TASK SCHEDULE			C
Due Date	05/12/2022 at 03:31 PM	×	S
Priority	Hig	h >	С
Category	Lab Results	×	A
			L
NOTE			A
Please review par	tient note and run necessary te	sts.	F

2:32 🗗		. II ? 🗗
	Tasked saved	
	Tasks	+
Statuses		
All		>
Open		3 >
In Progress		>
On Hold		>
Complete		>
Sample Status		>
Categories		
All		>
Lab Results		1 >
Appointments		>
Medications		>
Missed Appointme	nts	>

ASSOCIATED ITEMS		
Patient	Laurie Sample	×
Lab Document Lab Res	ult - 05/05/2022 02:12PM	×
Add Ass	ociated Item	





Tasks



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

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Tasks	+	Tasks	+	🗸 Tasks	+
itatuses		Filters (1)		Filters (1)	
All	>	Open (3)		Lab Results (1)	
Open	3 >	Lab Orders Assigned to Lab Tech		Lab Orders Assigned to Lab Tech	
n Progress	>	Created: 05/12/2022 Due on: 05/12/2022 03:31 PM Laurie Sample	Open High Lab Results	Created: 05/12/2022 Due on: 05/12/2022 03:31 PM Laurie Sample	Open High Lab Results
On Hold	>	[No Subject]			
Complete	>	Assigned to James Smith Created: 04/11/2022 Due on: None	Open Medium		
Sample Status	>				
Categories		[No Subject] Assigned to James Smith			
All	>	Created: 04/08/2022 Due on: None	Open Medium		
Lab Results	1 >				
Appointments	>				
Medications	>				
Missed Appointments	>				

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 1 .iii ? 🚱	2:34 /	🌫 🚱	2:35 - 7	. II 🗢 🕢
K Back	Close	► () i =	Cancel	New Task Templates, Save
Eaurie Sample Female 31 12/08/1990 Super Bill Vitals	H&P / Copy Other Note Create Task H&P Cache Billing Code Search		TASK ASSIGNMENT Task Title	
Start Visit	CC / History of Present Illness		Assignee	>
Appointment Details	Med / Fam / Social History		Status	Open >
05/12 09:15AM, 30 minutes	review of System		TASK SCHEDULE	
	Physical Exam		Due Date	>
Appointment Profile >	Assessment		Priority	Medium >
Appointment Status >	🖊 Plan		Category	>
Appointment Status History >	SOAP		NOTE	
New Appointment	U Subjective		NOTE	
New Video Visit	Q Objective			
	Assessment			
Create Task	📝 Plan		ASSOCIATED ITEMS	
Reschedule / Edit Appointment	Billing		Patient	Laurie Sample \times
	ICD-10 Codes		Appointment	05/12/2022 09:15 AM ×
Delete Appointment	S Billing		A	dd Associated Item
Cancel	🔀 View Complete Not	е	-	