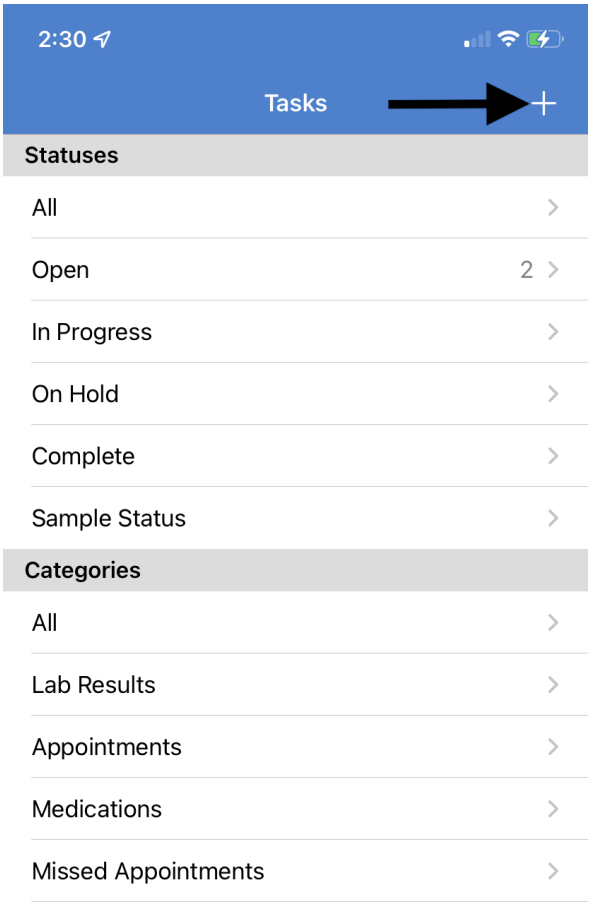
Creating a Task on the iPhone

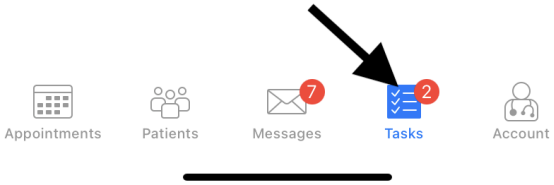
07/24/2024 1:30 pm EDT

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.

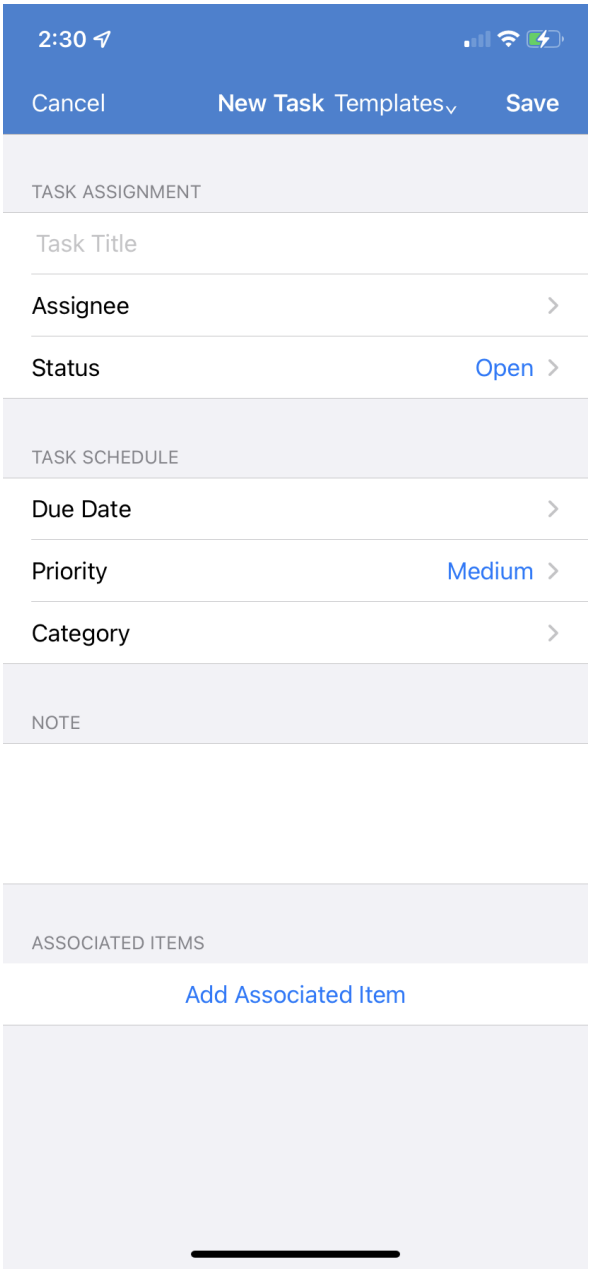




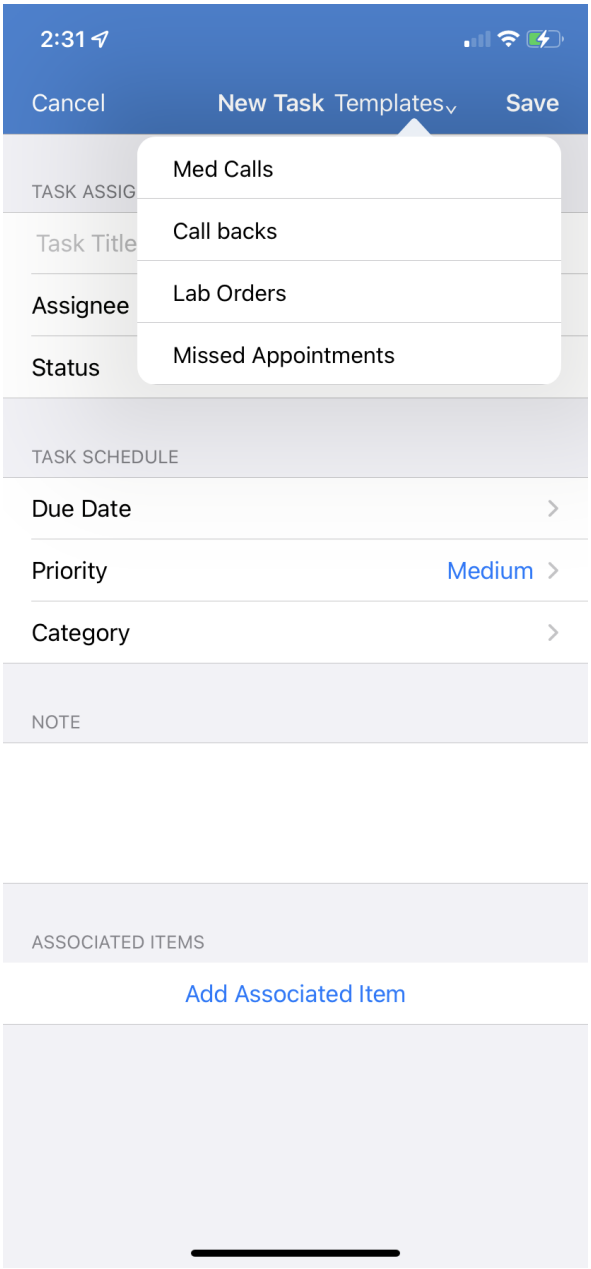
You can create the task manually by:

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

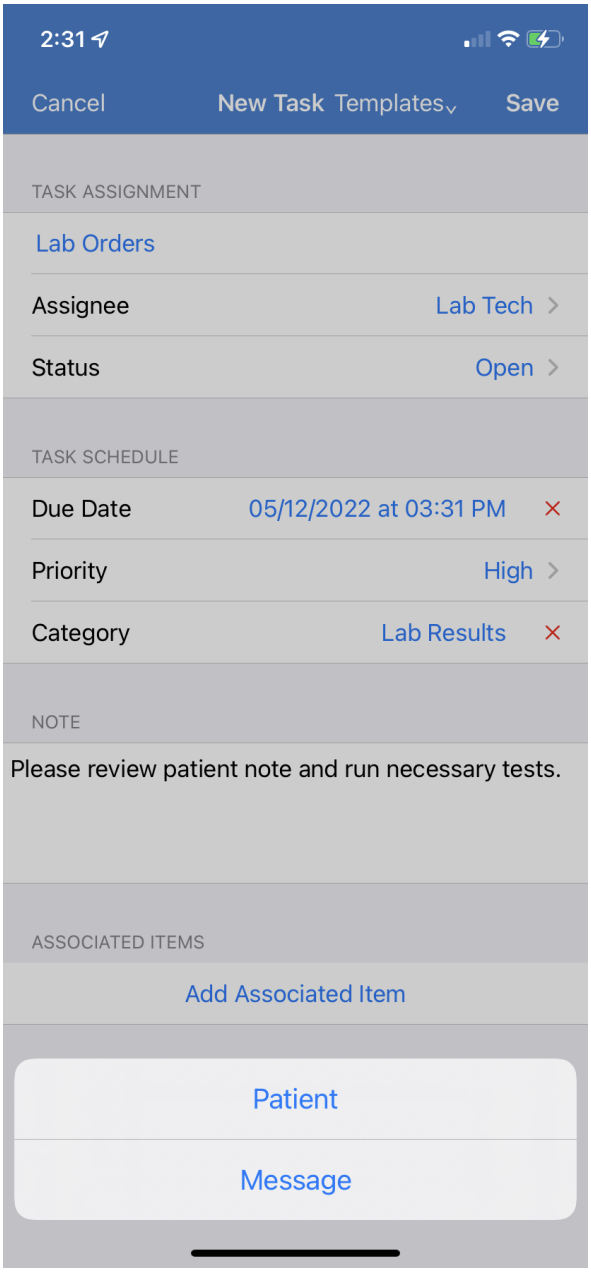
- Priority
- Category



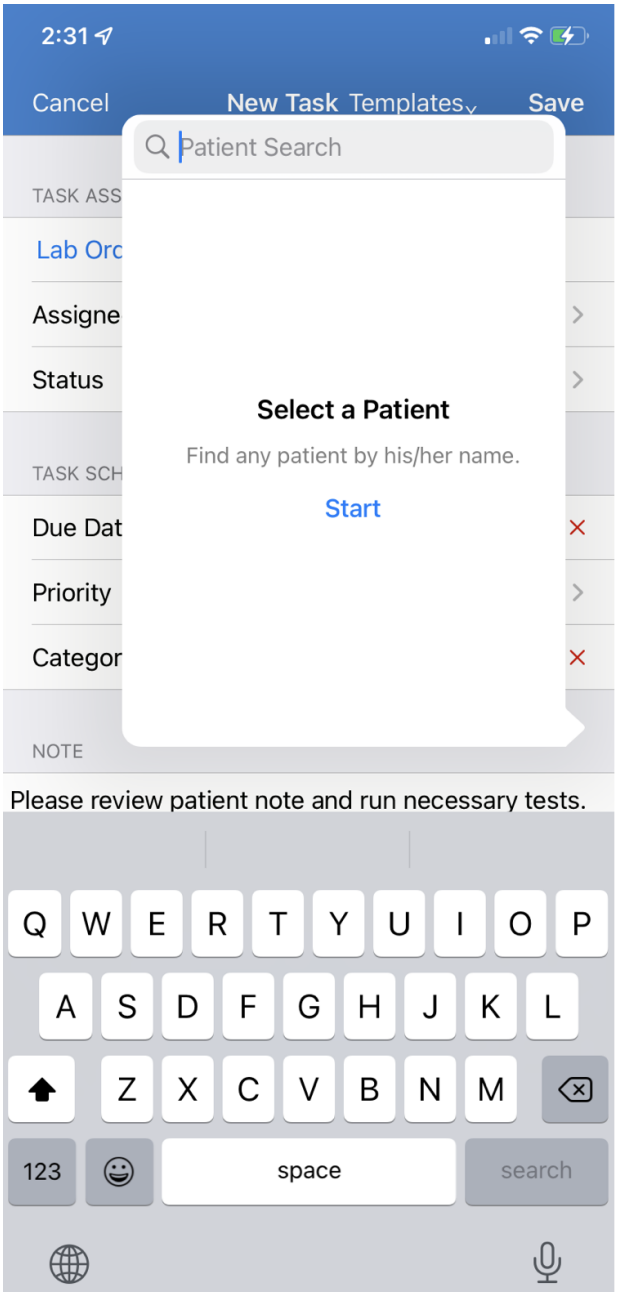
If you have a task template you have created on the web, you can select it from the menu.

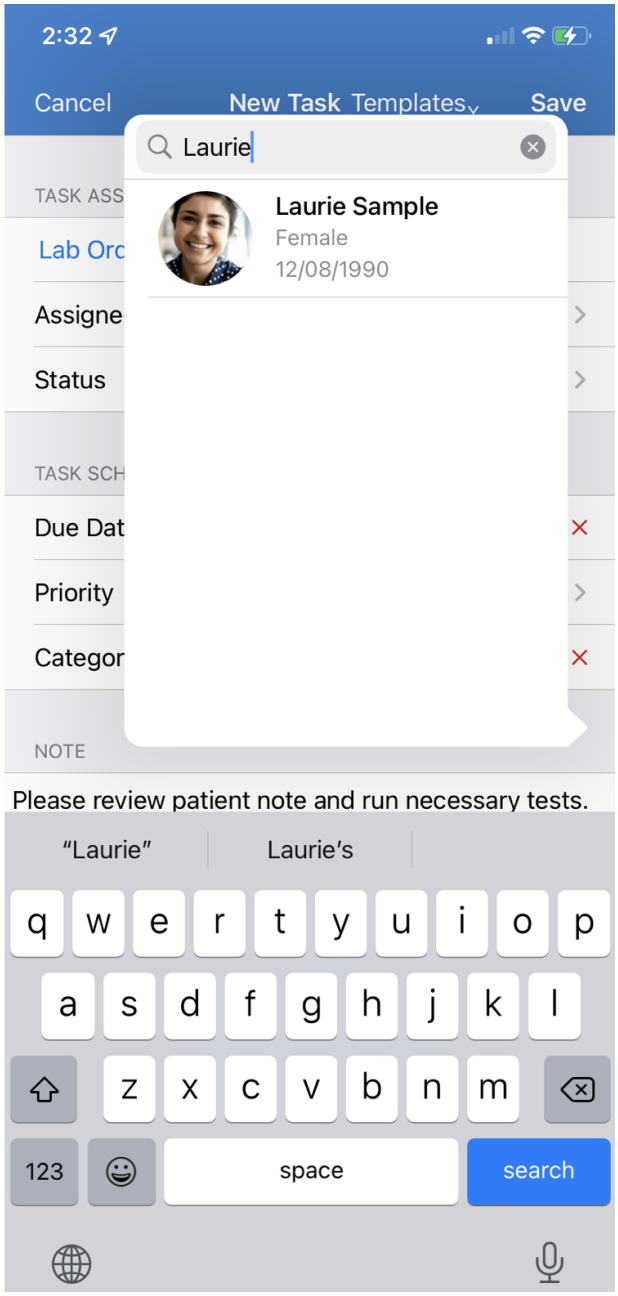


Select **Add Associated Item** to add a patient and/or document.

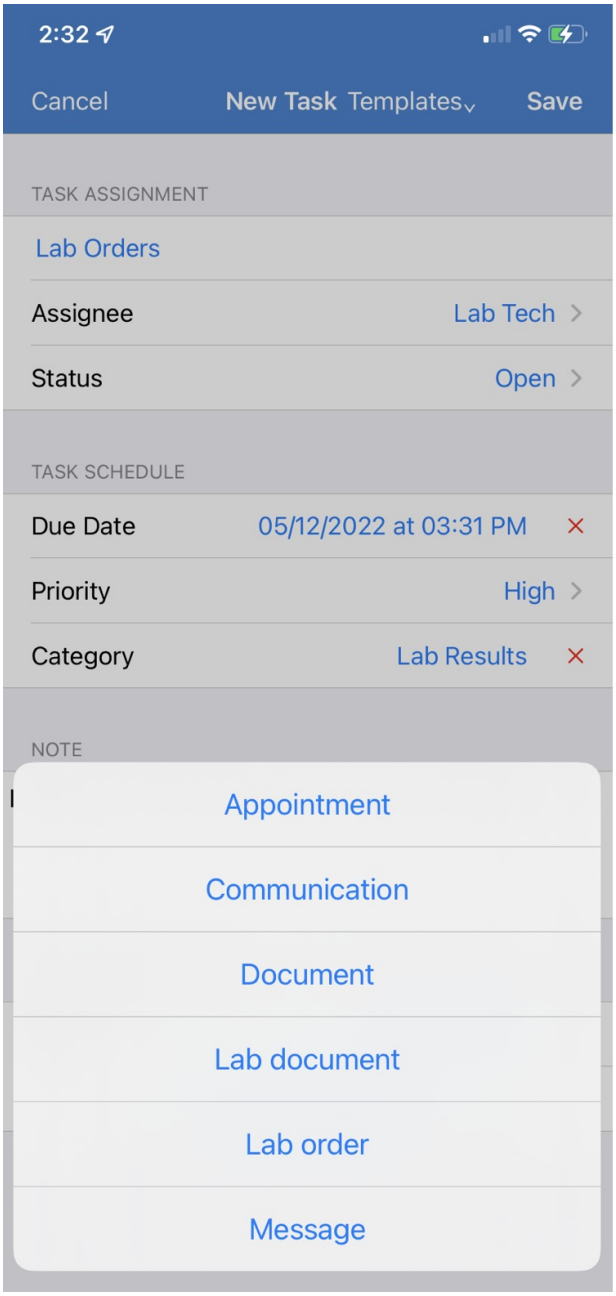


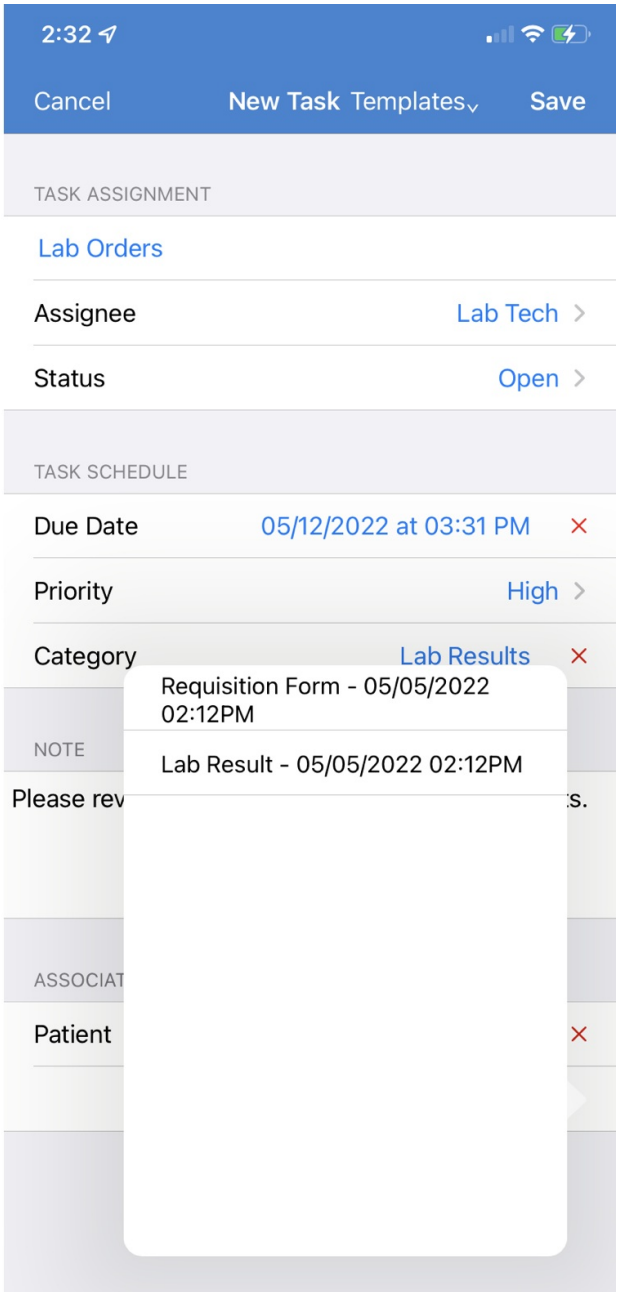
Search for the patient you would like to make the task for.



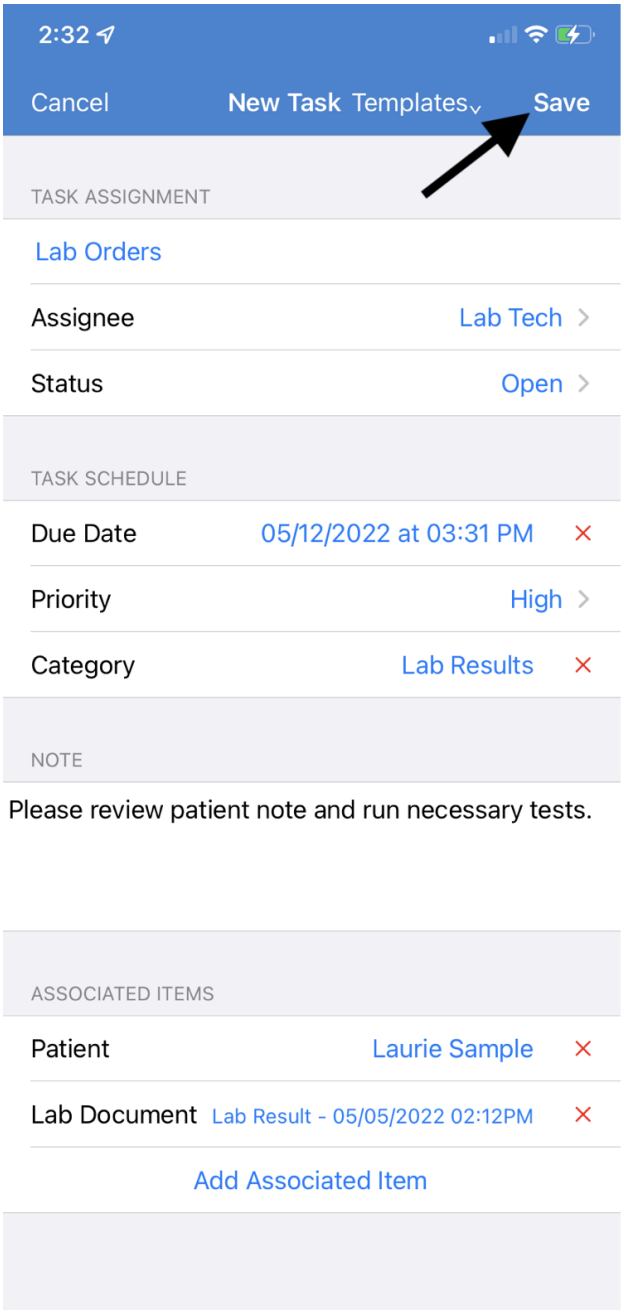


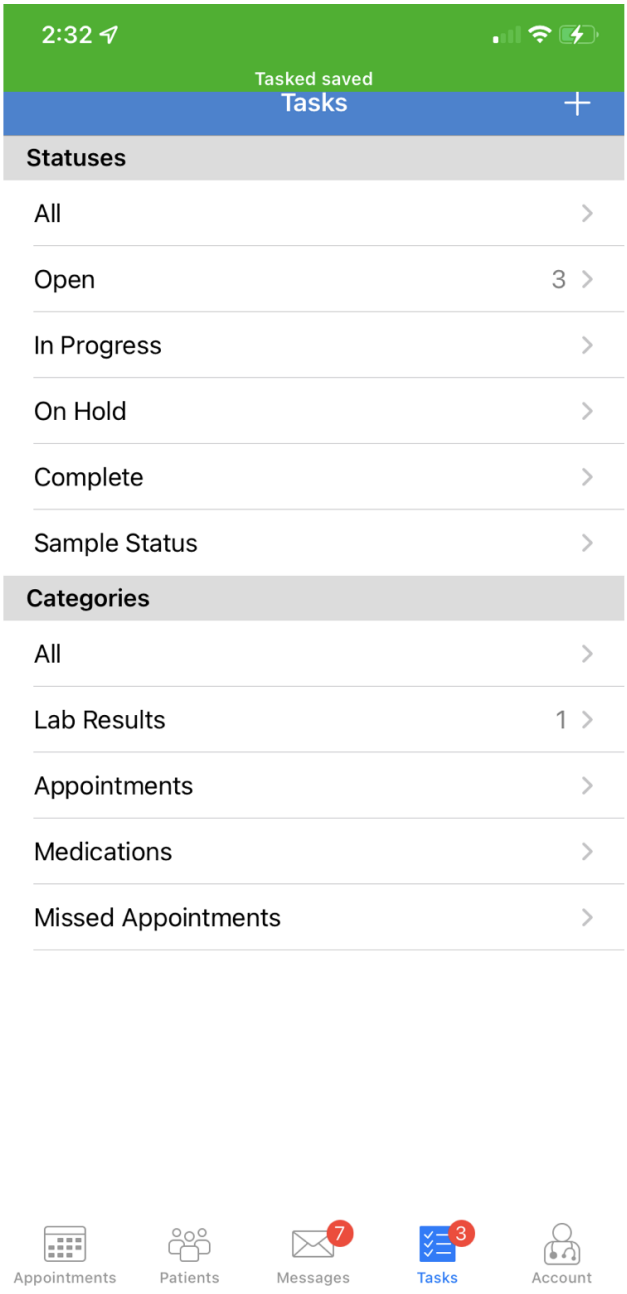
If needed, you can select an item from the patient's history to attach to the tasks.



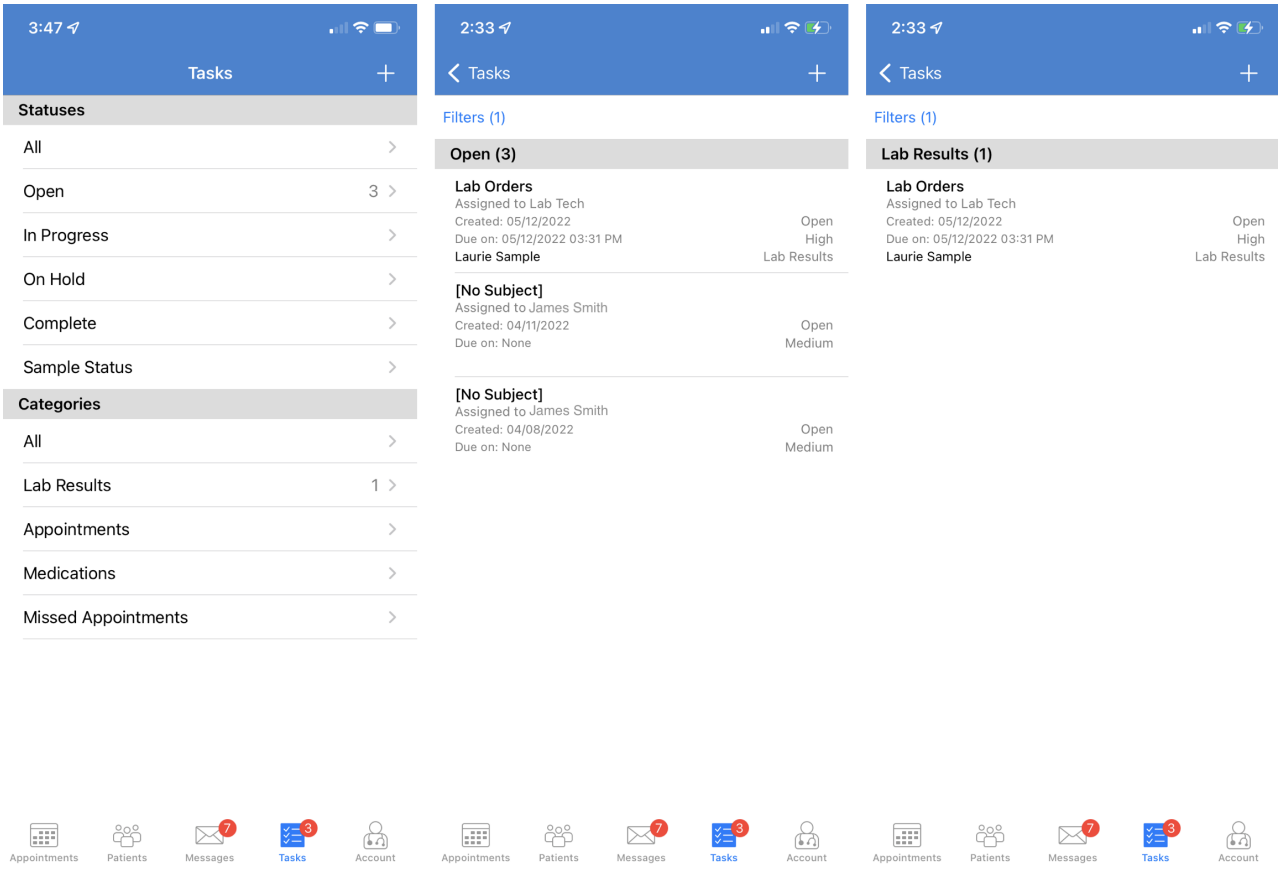


Tap **Save** when finished. You will see a green success message on the top.



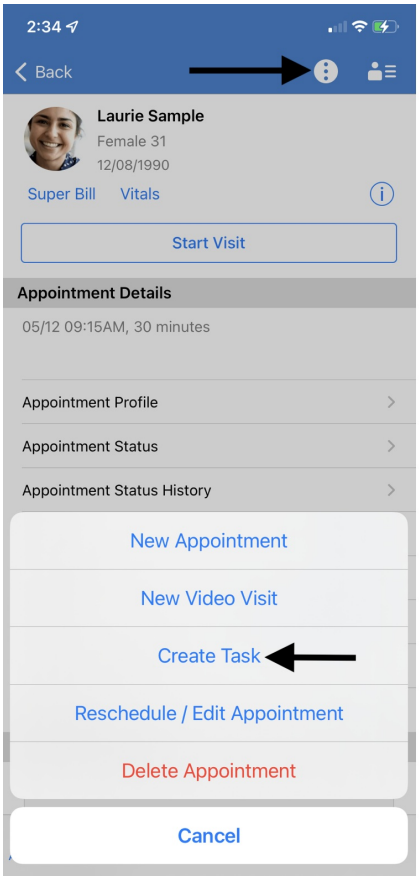


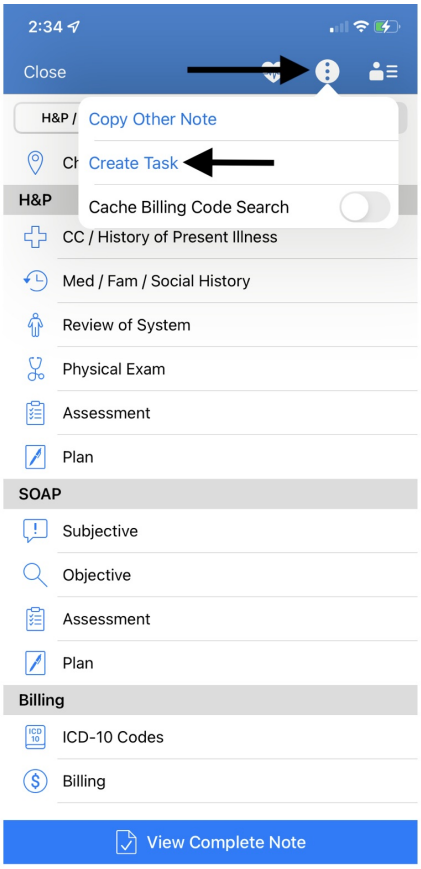
Once the task is created, you can access it from the main menu by selecting status or category.

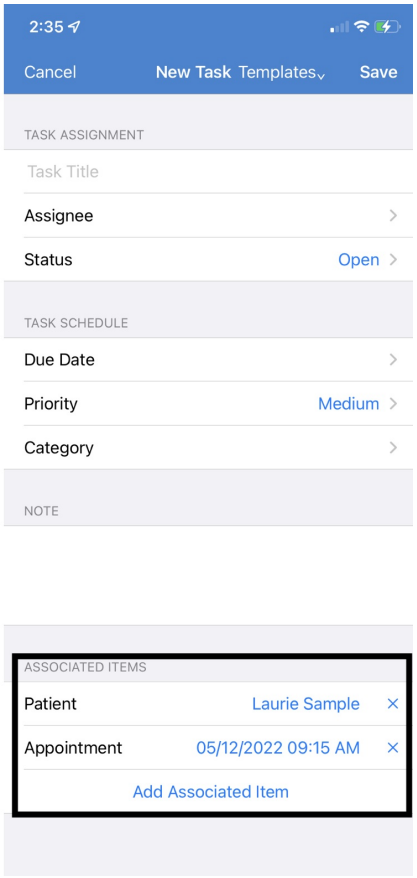


If you have already selected an appointment, tap the menu (

) 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
H&P
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
Appointment
05/12/2022 09:15 AM
Add Associated Item