## **Creating a Task on the iPhone**

07/08/2024 7:24 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 7		
	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 7		al 🗢 🛃
Cancel	New Task Templates <sub>v</sub>	Save
TASK ASSIGNMENT		
Task Title		
Assignee		>
Status		Open >
TASK SCHEDULE		
Due Date		>
Priority	Ме	edium >
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 <del>/</del> /	.ıl 🗢 (	<b>4</b> ),
Cancel	New Task Templates√ Sa	ve
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>-</i> 7	. 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 pat	ient note and run necessary tests.	
ASSOCIATED ITEMS	5	
A	dd Associated Item	
	Patient	
	Message	

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

2:31 <i>-</i> 7	.ıl 🗢	<b>5</b>	2:32 🛷			🗢 🚺
Cancel		ave	Cancel		w Task Template	
	Patient Search	_		Q Laurie		$\otimes$
TASK ASS			TASK ASS	25)	Laurie Sample Female	
Lab Orc			Lab Orc		12/08/1990	
Assigne		>	Assigne			>
Status	Select a Patient	>	Status			>
	Find any patient by his/her name.					
TASK SCH	Start		TASK SCH			
Due Dat		×	Due Dat			×
Priority		>	Priority			>
Categor		×	Categor			×
NOTE	patient note and run necessary te	oto	NOTE	ownationt	noto and run noo	and the sta
Please leview	patient note and run necessary te	515.	"Laurie		note and run nece Laurie's	essary lests.
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If needed, you can select an item from the patient's history to attach to the tasks.

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Cancel	New Task Templates <sub>∨</sub> Sa	ave	Cancel	<b>New Task</b> Templates <sub>v</sub>
TASK ASSIGNMEN	Т		TASK ASSIG	NMENT
Lab Orders			Lab Order	S
Assignee	Lab Tech	n >	Assignee	Lab Te
Status	Oper	n >	Status	Ор
TASK SCHEDULE			TASK SCHEE	DULE
Due Date	05/12/2022 at 03:31 PM	×	Due Date	05/12/2022 at 03:31 PM
Priority	High	n >	Priority	Hi
Category	Lab Results	×	Category	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 <del>/</del>	· II 🗢	<b></b>	2:32
Cancel	New Task Templates, Sa	ave	
			Statuse
TASK ASSIGNMEN	T		All
Lab Orders			Open
Assignee	Lab Tecl	n >	In Prog
Status	Oper	n >	On Ho
TASK SCHEDULE			Compl
Due Date	05/12/2022 at 03:31 PM	×	Sampl
Priority	Higl	n >	Catego
Category	Lab Results	×	All
			Lab Re
NOTE			Appoir
Please review pa	tient note and run necessary te	sts.	

2:32 7	? 6
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Statuses	
All	>
Open	3 >
In Progress	>
On Hold	>
Complete	>
Sample Status	>
Categories	
All	>
Lab Results	1 >
Appointments	>
Medications	>
Missed Appointments	>

ASSOCIATED ITEMS		
Patient	Laurie Sample	×
Lab Document Lab Resu	ılt - 05/05/2022 02:12PM	×
Add Asso	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	+	<b>&lt;</b> Tasks	+	<b> </b>	+
tatuses		Filters (1)		Filters (1)	
All	>	Open (3)		Lab Results (1)	
Dpen	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
Dn Hold	>	[No Subject]			
Complete	>	Assigned to James Smith Created: 04/11/2022 Due on: None	Open Medium		
Sample Status	>				
ategories		[No Subject] Assigned to James Smith			
All	>	Created: 04/08/2022 Due on: None	Open Medium		
ab Results	1 >				
Appointments	>				
Medications	>				
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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.

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K Back	Close	• 🛃 🛔 🛓 🗧	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	-	