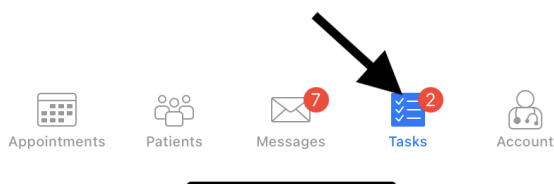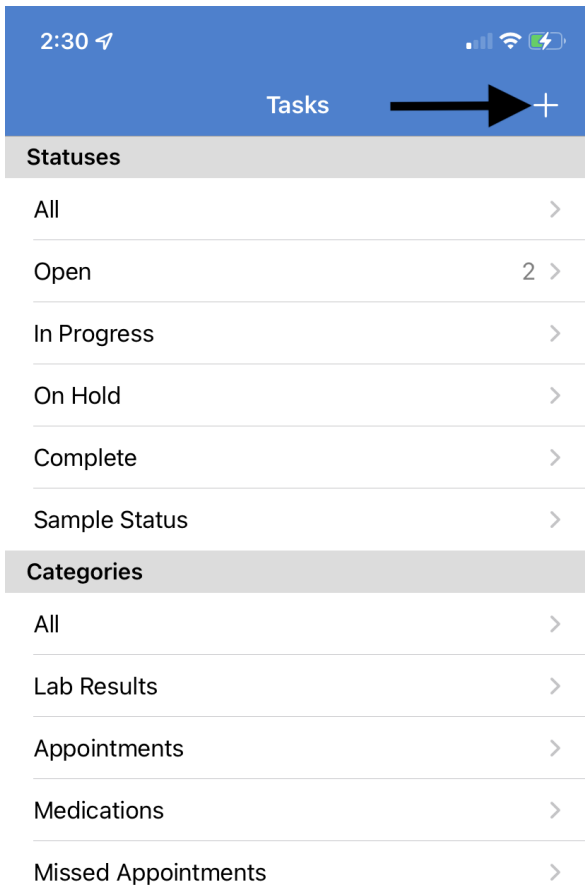# Creating a Task on the iPhone

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.

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.

Cancel   **New Task** Templates ⌄   **Save**

TASK ASSIG

Med Calls

Task Title

Call backs

Assignee

Lab Orders

Status

Missed Appointments

TASK SCHEDULE

Due Date   >

Priority   Medium   >

Category   >

NOTE

ASSOCIATED ITEMS

Add Associated Item

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

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.

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 ✕
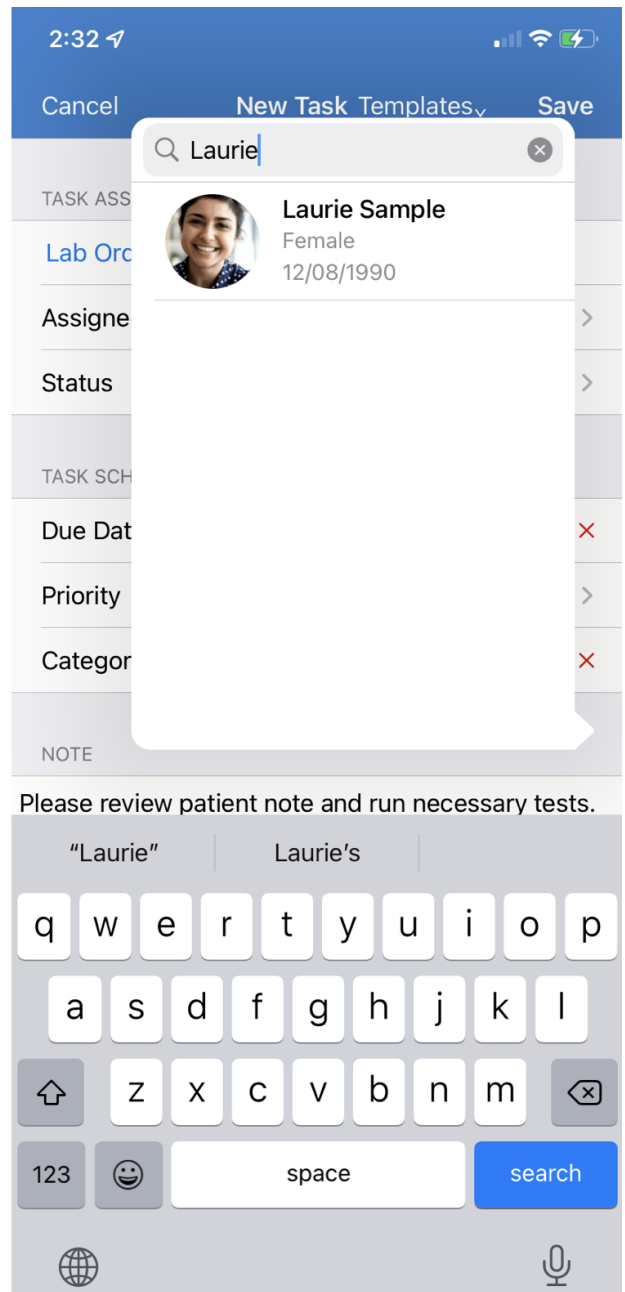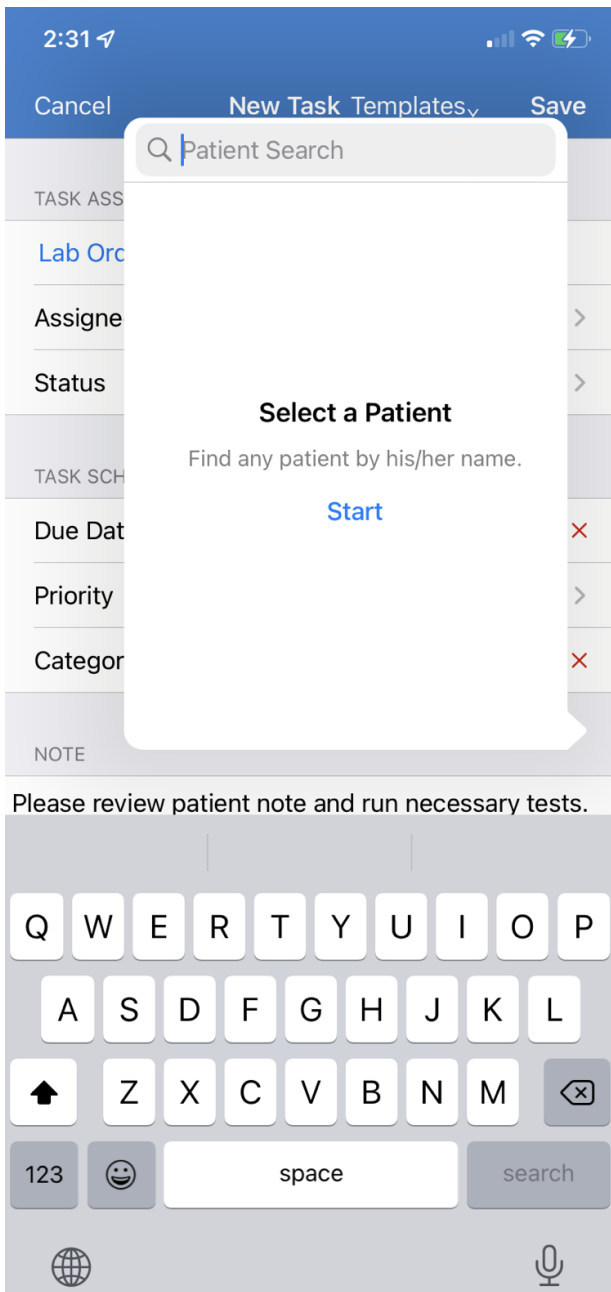
NOTE

Please review patient note and run necessary tests.
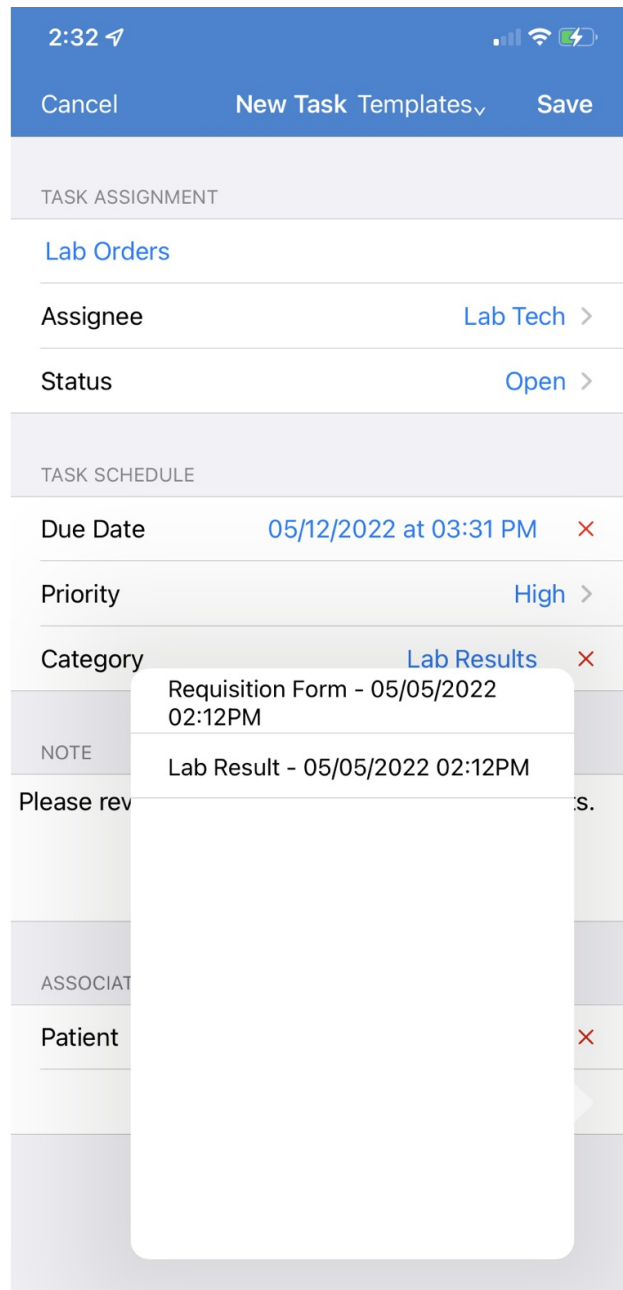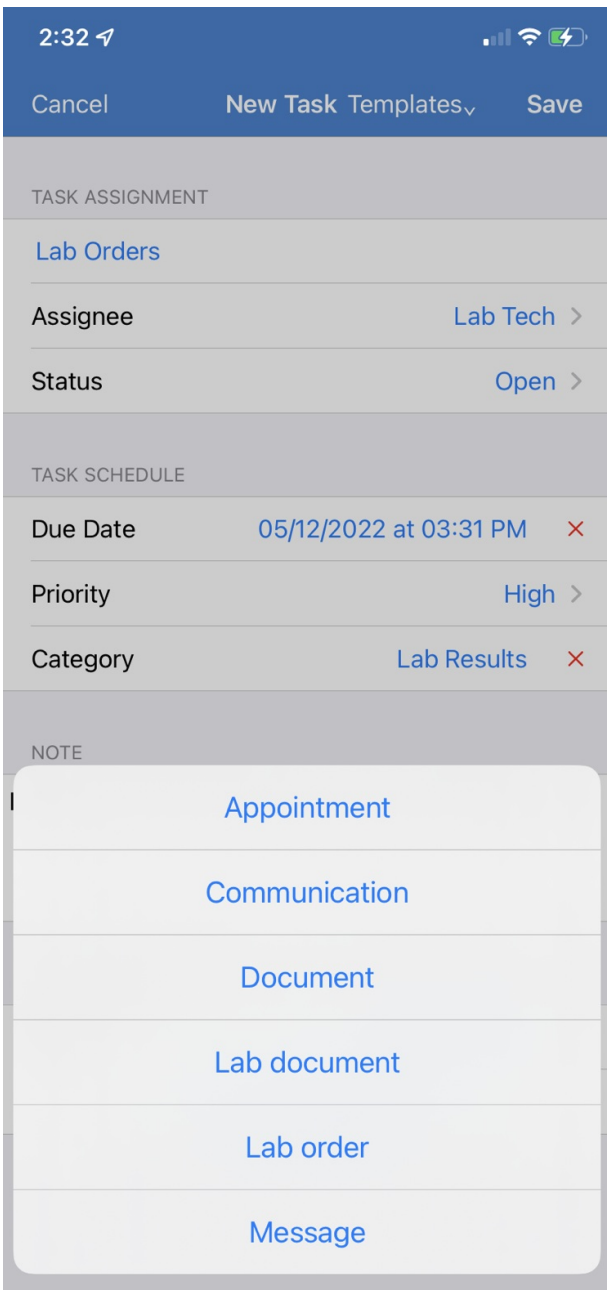
ASSOCIATED ITEMS

Patient   Laurie Sample ✕

Lab Document Lab Result – 05/05/2022 02:12PM ✕

Add Associated Item

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.

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

Filters (1)

Open (3)

Lab Orders
Assigned to Lab Tech
Created: 05/12/2022   Open
Due on: 05/12/2022 03:31 PM   High
Laurie Sample   Lab Results

[No Subject]
Assigned to James Smith
Created: 04/11/2022   Open
Due on: None   Medium

[No Subject]
Assigned to James Smith
Created: 04/08/2022   Open
Due on: None   Medium

Appointments Patients Messages ⑦ Tasks ③ Account
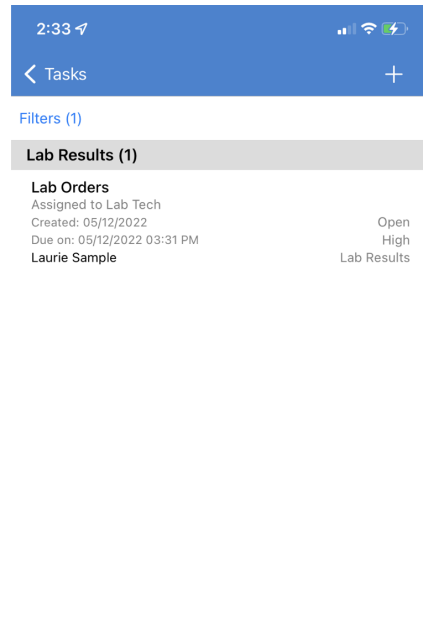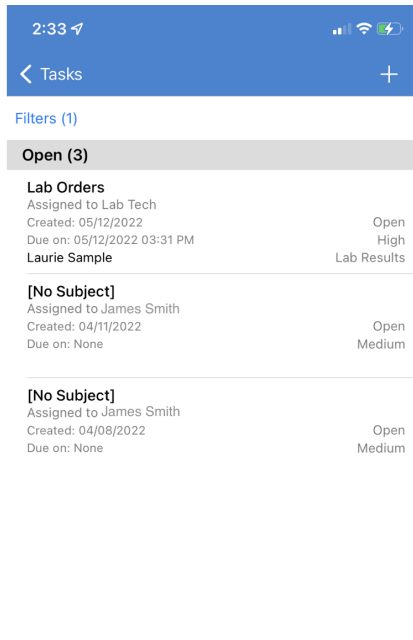
Filters (1)

Lab Results (1)

Lab Orders
Assigned to Lab Tech
Created: 05/12/2022   Open
Due on: 05/12/2022 03:31 PM   High
Laurie Sample   Lab Results

Appointments Patients Messages ⑦ Tasks ③ Account

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.

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

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

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