## **Creating a Task on the iPad**

07/08/2024 7:26 pm EDT

Creating a task on the iPad 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.

2:45 PM Tue Feb 1		
	Tasks	+
Statuses		
All		>
Open		23 >
In Progress		>
On Hold		>
Complete		1 >
Sample Statu	S	>
Categories		
All		>
Lab Results		>
Appointments	6	1 >
Medications		3 >
Missed Appoi	intments	1 >
	( ) Dashboard	

You can create the task manually by:

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

2:46 PM Tue Feb 1				•••		
	Tasks	<b>+</b>				
Statuses		Cancel		New Task	Templates <sub>∨</sub> Sa	ve
All		TASK ASSIGNMEN	17			
Open		Task Title				
In Progress						
On Hold		Assignee				>
		Status			Open	>
Complete		TASK SCHEDULE				
Sample Status		Due Date				>
Categories						
All		Priority			Medium	>
Lab Results		Category				>
Appointments		NOTE				
Medications		NOTE				
Missed Appoin	tments					
			10			
		ASSOCIATED ITEN	ИS			
				Add Associated Item		
Ê	🕗 Dashbo	ard	dr EHR	Messages	Tasks	(

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

:47 PM Tue Feb 1			•••			<b>1</b> 🗢 41%
Tasks	+					
Statuses	Cancel		New Task	Templates <sub>v</sub>	Save	
All				Med Calls		
Open	TASK ASSIGNMENT			Call backs		
In Progress				Lab Orders		
On Hold	Assignee			Missed Appointments		
	Status			Missed Appointments		-
Complete	TASK SCHEDULE					
Sample Status	Due Date				>	
Categories						
All	Priority			Med	dium >	
Lab Results	Category				>	
Appointments	NOTE					
Medications	NOTE					
Missed Appointments						
	ASSOCIATED ITEMS		Add Approximated Itsur			
			Add Associated Item			
Dasht	board	dr Ehr	Messages	(45) S= Tasks	(	O Account

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

2:48 PM Tue Feb 1		•••	
Tasks	+		
Statuses	Cancel	New Task Templates <sub>∽</sub> Sav	'e
All			
Open	TASK ASSIGNMEN	Ť	
In Progress	Lab Orders		
	Assignee	Lab Tech	>
On Hold	Status	Open	>
Complete			
Sample Status	TASK SCHEDULE		
Categories	Due Date	02/01/2022 at 03:47 PM	×
All	Priority	High	>
Lab Results	Category	Lab Results	×
Appointments	NOTE		
Medications	Please review pa	tient note and run necessary tests.	
Missed Appointments		Patient	
		Message	
	ASSOCIATED ITEN		
		Add Associated Item	
Dashi	poard	dr EHR Messages	

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

2:50 PM Tue Feb 1			•••		
Tas					
Statuses	Cancel		New Task	Templates <sub>v</sub>	Save
All					
Open	TASK ASSIGNMEN				
	Medication Ca	lls			
In Progress	Assignee				>
On Hold	Status				Open >
Complete					
Sample Status	TASK SCHEDULE		Q Patie	ent Search	
Categories	Due Date				×
All	Priority				>
Lab Results	Category				×
Appointmente					
Appointments	NOTE				
Medications	Call patient abou	It medications.		Select a Patient	
Missed Appointmen	ts		Find	any patient by his/her nan	ne.
				Start	
	ASSOCIATED ITEM	IS			
		Add /	Associate		
Da	ashboard	dr ehr [	Messa		(

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

2:50 PM Tue Feb 1		•••	
Tasks			
Statuses	Cancel	New Task	Templates <sub>∨</sub> Save
All			
Open	TASK ASSIGNMENT		
In Progress	Medication Calls		
	Assignee		>
On Hold	Status		Open >
Complete			
Sample Status	TASK SCHEDULE		
Categories	Due Date	02	2/02/2022 at 03:50 PM ×
All	Priority	Appointment	Medium >
Lab Results	Category	Communication	Rx ×
Appointments	NOTE	Document	
ledications	Call patient about medication		
Missed Appointments		Lab document	
		Lab order	
	ASSOCIATED ITEMS	Message	
	Patient	Wicssuge	Laurie Sample ×
		Add Associated Item	
Dash	board dr EHR	Messages	Tasks

Tap Save when finished.

2:51 PM Tue Feb 1			•••		
Т	asks 📕				
Statuses	Cancel		New Task	Templates <sub>∨</sub> Sa	ive
All		<del>.</del>			
Open	TASK ASSIGNMEN				
In Progress		IIS			
	Assignee			Front Desk	$\langle \rangle$
On Hold	Status			Oper	>
Complete					
Sample Status	TASK SCHEDULE				
Categories	Due Date			02/02/2022 at 03:50 PM	×
All	Priority			Medium	>
Lab Results	Category			Rx	×
Appointments	NOTE				
Medications	Call patient abou	t medications.			
Missed Appointm	ents				
	ASSOCIATED ITEM	S			
	Patient	5		Laurie Sample	×
	Comm. Log			Call - 01/04/22 09:49AM	×
	Dashboard	dr ehr	Messages	<mark>₹45</mark> ≷≡ Tasks	

## You will see a green success message on the top.

2:51 PM Tue Feb 1		
	Tasks	+
Statuses		
All		>
Open		24 >

## Once the task is created, you can access it on the left.

2:53 PM Tue Feb 1			•••					
🗸 Tasks	+					Edit		
Filters (1)		Medication Calls						
Open (24)		Start Date 02/01/2022 02:51 PM	Due Date 02/02/2022 03:50 PM	Time Remaining 1 Day 0 Hour 57 Min	Priority Medium			
Medication Calls Assigned to Front Desk Created: 02/01/2022	Open	Assigner James Smith	Assignee Front Desk	Category Rx	Status Open			
Due on: 02/02/2022 03:50 PM Laurie Sample	Medium Rx	Patient Laurie Sample				View Patient		
Call backs Assigned to James Smith		Communication Call - 01/04/22 09:49AM				View Comm. Log		
Created: 01/18/2022 Due on: 01/20/2022 04:09 PM Laurie Sample	Open Medium Patient Calls	Called patient. Discusse	View Notes (1)					

## If you have already selected the patient, tap the (



) and select **Create Task**. The patient's name will already be associated with the task.

4:40 PM Tue Feb 1	••••	19	37%  10:17 AM Wed Feb 2		••••		
Close			+ Close				
Visit Patient History	Jenny (Jen) Harris (Female   41   02/11/198 cc N/A	0) Vew Appointment		Cancel	New Task	Templates <sub>~</sub> Sav	e
Patient Information		New Video Visit	Visit Patie	TASK ASSIGNMENT			
Patient Information	Conditions	Medica	Patient Information				
Face Sheet	N39.0: Chronic urinary tract infection (disorder)	take 1 tz	Patient Informat				ion >
Patient Flags	M41.20: Idiopathic scoliosis AND/OR kyphoscoliosis (disorder)	12 Hour Take Clinical Photo	Face Sheet	Assignee			2
Repointment List	T78.49XA: Multiple environmental allergies (disorder)	cyclobe 1 a day a New Patient	P Patient Flags	Status		Open	>
Clinical Information	M54.5: Low back pain	Mirena 52 mg intrauterine device	N/A Appointment Lis	TASK SCHEDULE			
Medications & Allergies	Allergies	Flonase 50 mcg/inh nasal spray	Clinical Information	Due Date			>
Labs	Cats Shortness of breath/difficulty breathing	Cranberry oral capsule	N/A Medications & A	Priority		Medium	>
Growth Charts	Milk Hives	Recent Vitals 11/10/		Category			>
	penicillin Hives	Default Vitals					
	d00170 aspirin Hives	Temperature Pulse f	bpm Growth Charts	NOTE			
		Blood Pressure Respiratory Rate					
	Lab Results	0xygen Saturation Height	rpm				
	No Record	% 65.00 Weight BMI	in .				
		134 lb 0 oz lbs 22.30					
		Pain Smoking Status		ASSOCIATED ITEMS			
	Family History	Head Circumference		Patient		Jenny Harris	× No
					Add Associated Item		
				Contact Informatio	n		