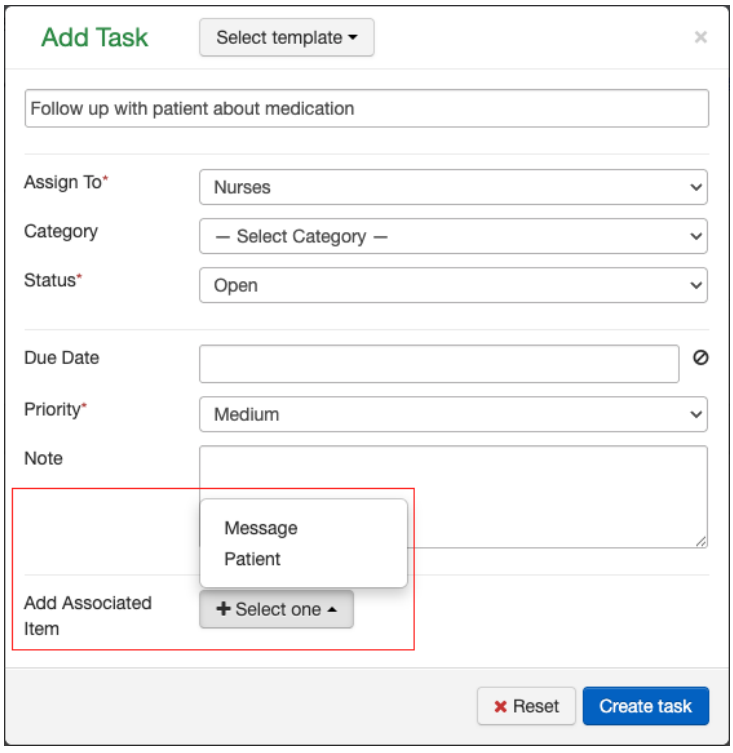
Create Tasks

Last modified on 07/22/2026 7:27 pm EDT

Create a task

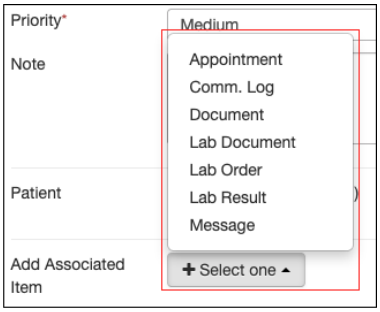
There are two ways to create a task from the navigation bar.

1. Do one of the following to open the **Add Task** window.
    - Select **Add Task** .
    - Select **Tasks** to open the **Task Center**, and then select **New Task**.
2. **(Optional)** If you have a task template, select it from the **Select template** menu.
3. **(Optional)** Select a patient or message to associate with this task from the **Add Associated Item** menu.



If you have the patient's chart open and select **Add Task** , the patient is already associated with the task.

5. **(Optional)** If you've associated a patient, you can associate more items (up to 25).



6. Complete the fields and select **Create task**.

7. Select **View** to see the task details in the **Task Center**.

