

# How do I create a task?

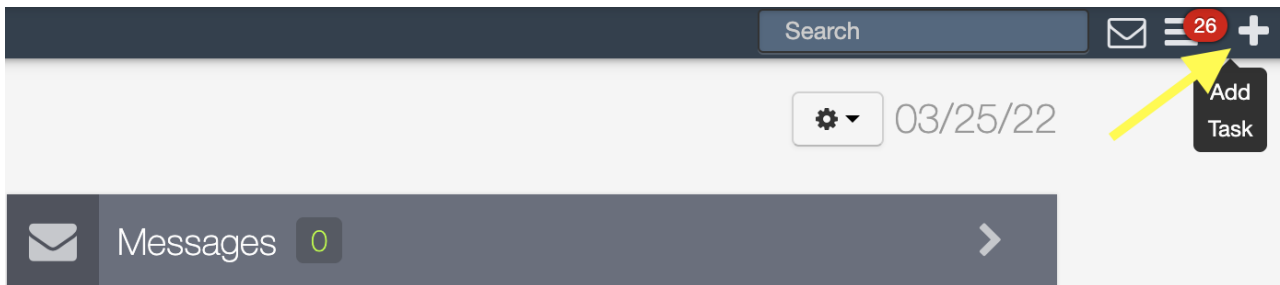
07/08/2024 7:31 pm EDT

## Creating a Task in DrChrono

There are two ways to create a new task in DrChrono: through the [navigation bar](#) or through the [task center](#).

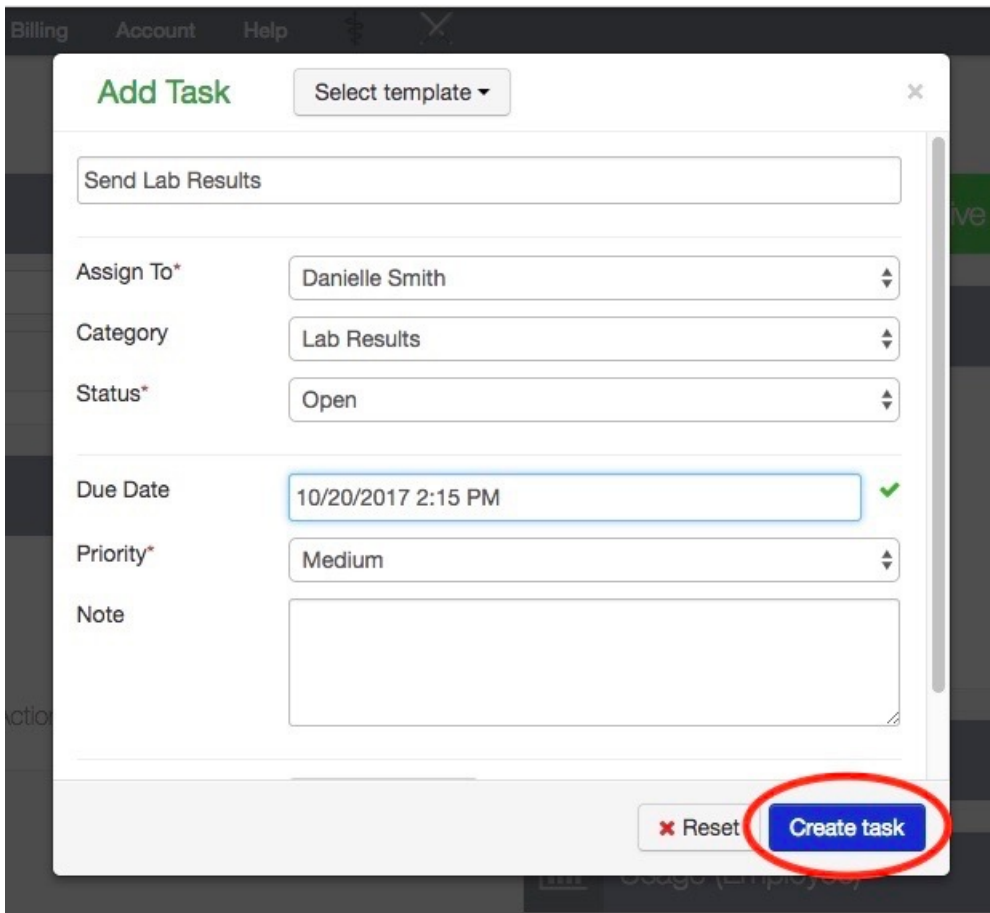
## Creating a Task in the Navigation Bar

1. Click on the + symbol on the far right side of the top toolbar.



2. Fill in the required information as well as any additional details. The required fields include Task Title, Assign To, Status, and Priority.

3. Click the blue **Create task** button.



4. You can either close the window or select the **View** button which will take you to the task center and show the details of the task you just created.

**Add Task** Select template ▾

Send Lab Results

Assign To\* Danielle Smith ▾

Category Lab Results ▾

Status\* Open ▾

Due Date 10/20/2017 2:17 PM ✓

Priority\* Medium ▾

Note

Task saved **View** **Close**

Schedule Clinical Patients Reports Billing Account Help Search

**+ New Task** **Task Details** **Archive**

**Statuses** Edit

All

Complete

In Progress

On Hold

Open

**Categories** Edit

All

Email

← Back

**Send Lab Results**

<b>Assigned To</b> Danielle Smith ▾	<b>Start Date</b> October 19th, 2017, 2:18 PM	<b>Due Date</b> October 20th, 2017, 6:17 PM (1 day, 3 hours from now) <b>Remove</b> <b>Edit</b>
<b>Priority</b> Medium ▾	<b>Category</b> Lab Results ▾	<b>Status</b> Open ▾

**Task Notes** Add Task Note **Related Items** + Add... ▾

No notes. No related items.

## Creating a Task in the Task Center

1. Click the three stacked lines on the far right side of the DrChrono dashboard to enter the task center.

Search

Messages 0

2. Select the green **New Task** button on the top left of the page.

The screenshot shows the dr chrono web application interface. At the top is a dark navigation bar with the following menu items: Schedule, Clinical, Patients, Reports, Billing, Account, and Help. Below the navigation bar is a green button labeled '+ New Task', which is circled in red. To the right of the '+ New Task' button is a 'Tasks' section. This section includes a filter bar with 'Assignee: Christy Ewing', 'Priority: All', and 'Due today'. Below the filter bar are buttons for 'Archive', 'Unarchive', and 'Show archived'. At the bottom of the 'Tasks' section is a table with the following headers: a checkbox, 'Associated patient', 'Title', 'Assigned to', and 'St'. On the left side of the page, there are two sections: 'Statuses' and 'Categories'. The 'Statuses' section has an 'Edit' button and a list of status options: All (highlighted in green), Complete, In Progress, On Hold, and Open. The 'Categories' section also has an 'Edit' button and a list of category options: All (highlighted in green), Email, Lab Results, MRI Results, and Phone Call.

3. Fill in the required information as well as any additional details. The required fields include Task Title, Assign To, Status, and Priority. Click the blue **Create task** button.

Billing Account Help

### Add Task

Select template ▾

Send Lab Results

Assign To\*

Category

Status\*

Due Date  ✓

Priority\*

Note

4. You can either close the window or select the **View** button which will take you to the task center and show the details of the task you just created.

### Add Task

Select template ▾

Send Lab Results

Assign To\*

Category

Status\*

Due Date  ✓

Priority\*

Note

Task saved

[+ New Task](#)

### Task Details

**Statuses** [Edit](#)

- All
- Complete
- In Progress
- On Hold
- Open

**Categories** [Edit](#)

- All
- Email

[← Back](#) [Archive](#)

Send Lab Results		
<b>Assigned To</b> Danielle Smith	<b>Start Date</b> October 19th, 2017, 2:18 PM	<b>Due Date</b> October 20th, 2017, 6:17 PM (1 day, 3 hours from now) <a href="#">Remove</a> <a href="#">Edit</a>
<b>Priority</b> Medium	<b>Category</b> Lab Results	<b>Status</b> Open

**Task Notes** [Add Task Note](#)

No notes.

**Related Items** [+ Add...](#)

No related items.