

How do I create a task template?

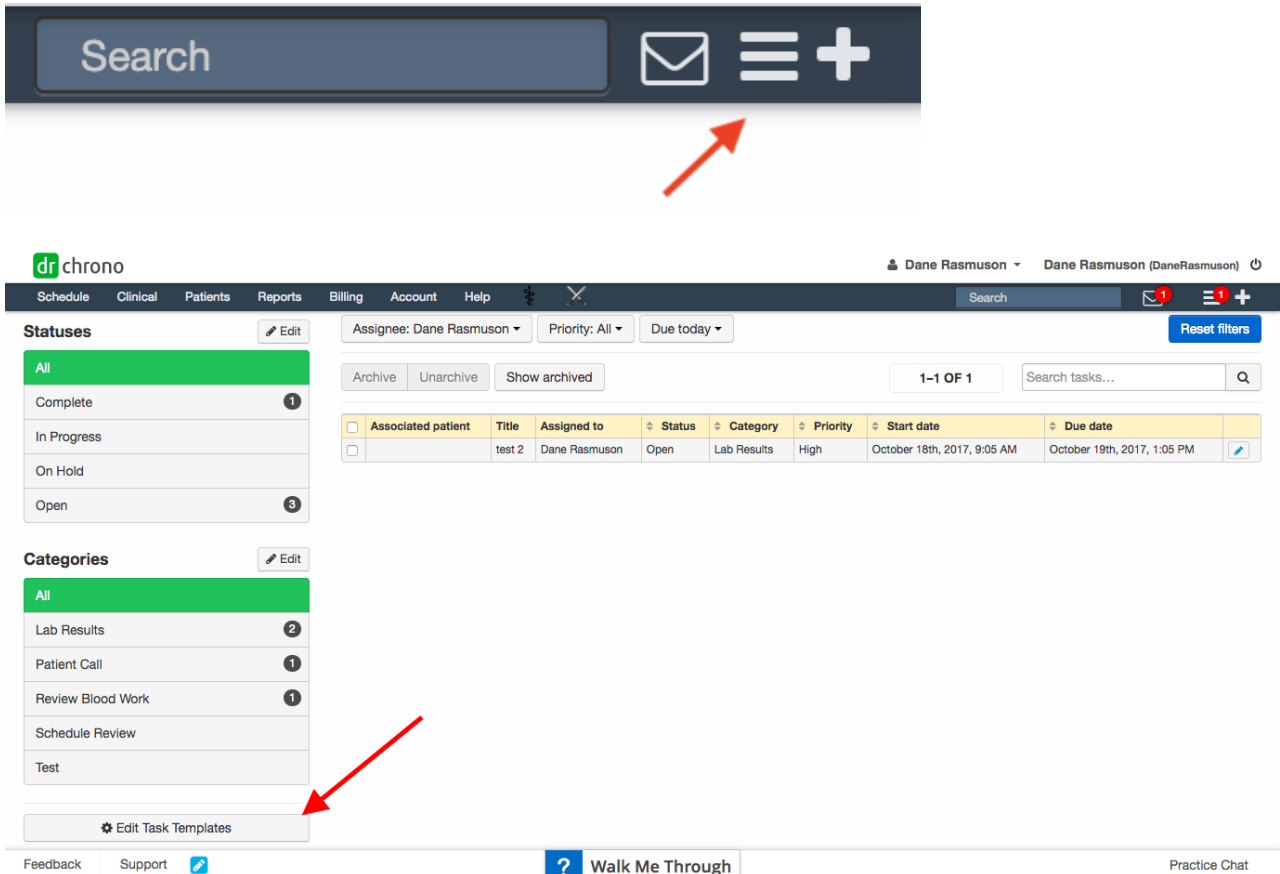
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Creating and editing task templates provides offices with customized options for how the tasks will function that best fit your office workflows.

1. Please access the task center (



), and click on **Edit Task Templates** towards the lower left of the page.



The screenshot shows the dr chrono task center interface. At the top, there is a dark navigation bar with a search bar, an envelope icon, a hamburger menu icon, and a plus sign. A red arrow points to the hamburger menu icon. Below the navigation bar, the interface shows a header with the user's name 'Dane Rasmuson' and a search bar. The main content area is divided into 'Statuses' and 'Categories' sections. The 'Statuses' section lists 'All', 'Complete', 'In Progress', 'On Hold', and 'Open'. The 'Categories' section lists 'All', 'Lab Results', 'Patient Call', 'Review Blood Work', 'Schedule Review', and 'Test'. A table of tasks is displayed below the categories, with columns for 'Associated patient', 'Title', 'Assigned to', 'Status', 'Category', 'Priority', 'Start date', and 'Due date'. A red arrow points to the 'Edit Task Templates' button at the bottom left of the interface.

2. Once you are on this page, please click on the **+ Create New Template**. You should see the screen below.

Task Template Details

← Back Save

New Template Done *

Default Title <input type="text"/>	Default Assignee — None —	Default Due Date Offset 0 days, 0 hours, and 0 minutes
Default Priority Medium	Default Category — None —	Default Status — Select one —

Default Note

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Our template tool makes creating these task templates quick and easy. Once you decide exactly which options work best for your practice, you're all set.

3. After giving this template a name, default assignee, due date, priority, category, and status, please be sure to click **Save**.

Note: If the default assignee leaves the practice and is made **inactive**, please ensure any task templates assigned to the inactive user are reassigned. The default assignee will become the 1st active user in the drop-down.

You're also able to **Archive** a template if it is no longer needed.

After creating a few templates, your library will contain your templates. Select **Edit** to make any changes to the template.

Task Templates

← Back Show archived?

Name	Assignee	Due Date Offset	Priority	Status	Title	
Template 1.1	Dane Rasmuson	2 days	Medium	Open	Financial Reporting	<input type="button" value="Edit"/>
Template 1.2		1 days	High	Open	Lab Results Phone Call	<input type="button" value="Edit"/>

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