How do I create a task category?

07/08/2024 7:53 pm EDT

Creating a task category is a breeze with DrChrono's task system. This functionality allows greater customization and control when assigning tasks throughout the office. These categories organize an individual's task inbox for easier visibility of what needs to be done.
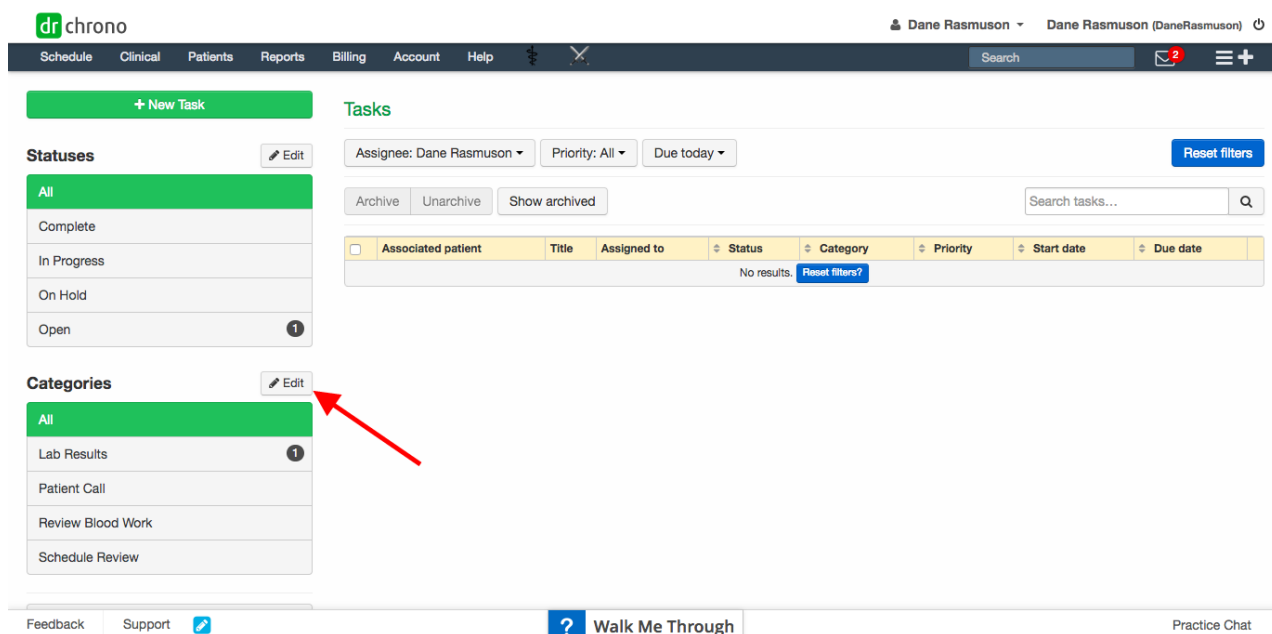
1. Please access the task center (

).

2. Once in the task center, please click the **Edit** button on the left-hand side of the screen, next to Categories.

3. To create a new category, simply type the name of the desired category and click **+New Category**. You're also able to remove unwanted categories by clicking the **Archive** button on the right side of the page.

Global Status Column

Yes = System-created category available to everyone and not editable/archivable.

No = User-created category, able to be edited or archived.

4. When assigning tasks, you can select a specific category on this screen.

Selecting task categories keeps tasks organized, as you can see here, tasks are organized by category.

Schedule   Clinical   Patients   Reports   Billing   Account   Help

Dane Rasmuson ▾   Dane Rasmuson (DaneRasmuson) ⏻

Search

✉ 2   ☰ +

+ New Task

Statuses   ✎ Edit

All

Complete

In Progress

On Hold

Open   4

Categories   ✎ Edit

All

Lab Results   2

Patient Call   1

Review Blood Work   1

Schedule Review

Test

Tasks

Assignee: Dane Rasmuson ▾   Priority: All ▾   Due today ▾   **Reset filters**

Archive   Unarchive   Show archived   Search tasks…   🔍

☐	Associated patient	Title	Assigned to	⇕ Status	⇕ Category	⇕ Priority	⇕ Start date	⇕ Due date

No results.   **Reset filters?**

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