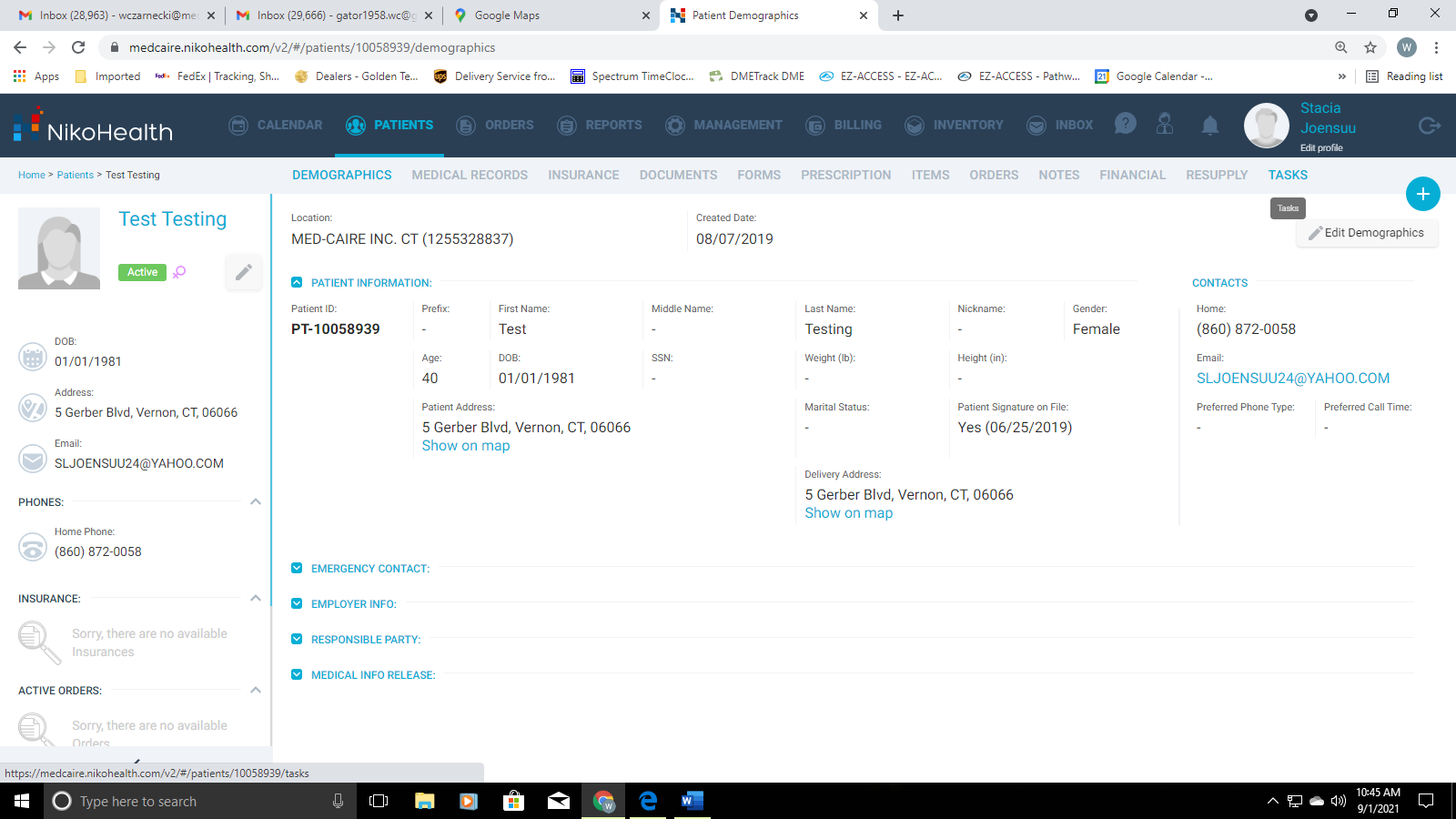
1- Select the Patient Tab and enter the patient's name you want to create a task for. Select the patient to enter the “Patient File”.

Graphical user interface, text

Description automatically generated

2- Select the tab labeled "TASKS" on the top "light grey menu bar"



3- Use the “Blue Plus sign” on the Top Right of the patient file to create a new task

Graphical user interface, application

Description automatically generated

4- Select "Create Task" from the drop-down menu

Graphical user interface, application

Description automatically generated

5- Fill in the "Title" (The reason for the task). Fill in the “Description” of the task needed. The patient will already be assigned to the task

A screenshot of a computer

Description automatically generated

6- Select the appropriate Task "Priority" from the drop down. Select the "Date" the task is due to be completed on and assign the “Team Member” that the task is for (This can be multiple users).

Graphical user interface, text, application, email

Description automatically generated

7- Once All necessary fields are completed, Save the task using the "Blue" Save button at the bottom right corner.

A screenshot of a computer

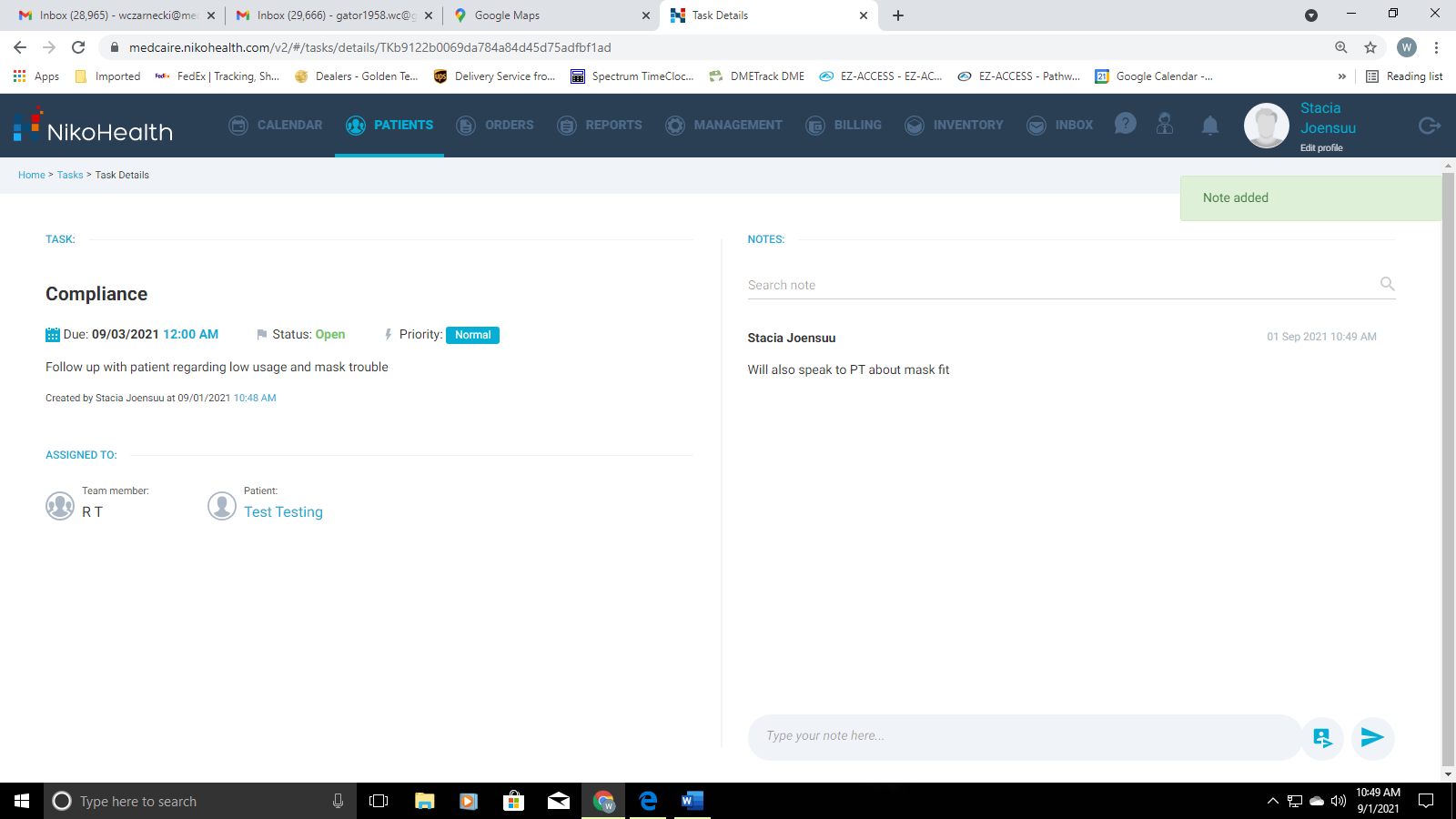
Description automatically generated

8- This is your created Task after being saved. The “Blue hyperlink” of the patient’s name will take you back to the patient’s file if you need.

A screenshot of a computer

Description automatically generated

9- You can add notes to the Task while the task is in progress. Any user who is assigned to the task can make a note in the task. You will add the comment where it says “Type your note here” then hit the “Blue Arrow” to submit the comment. Keep in mind, These notes are not transferred into the patient’s file, they are only in the task.



10- Using the "Blue Plus Sign" (Top Right Corner) you can now Complete the Task, Edit the Task, Delete the Task or Add a new Task

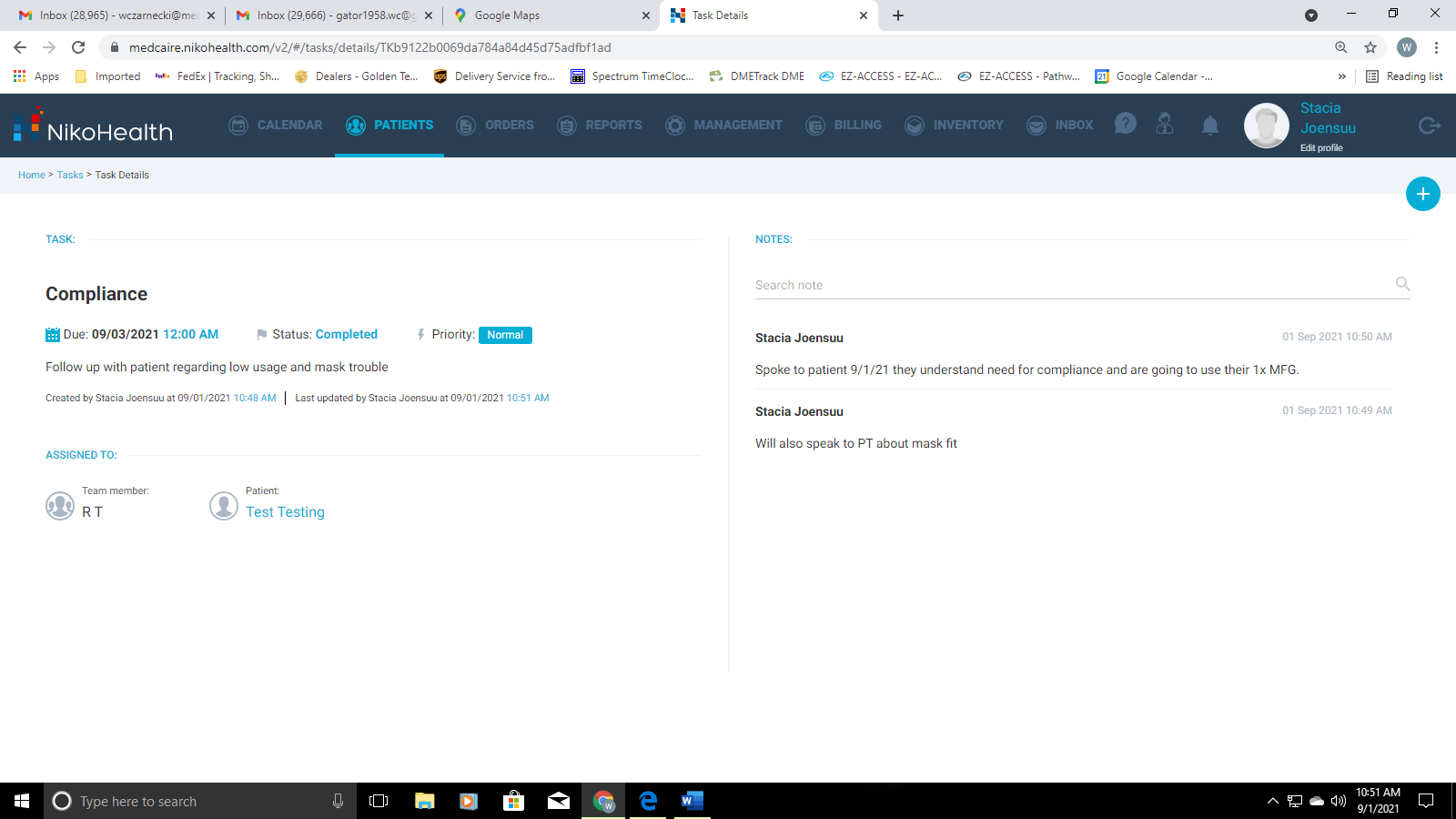
A screenshot of a computer

Description automatically generated

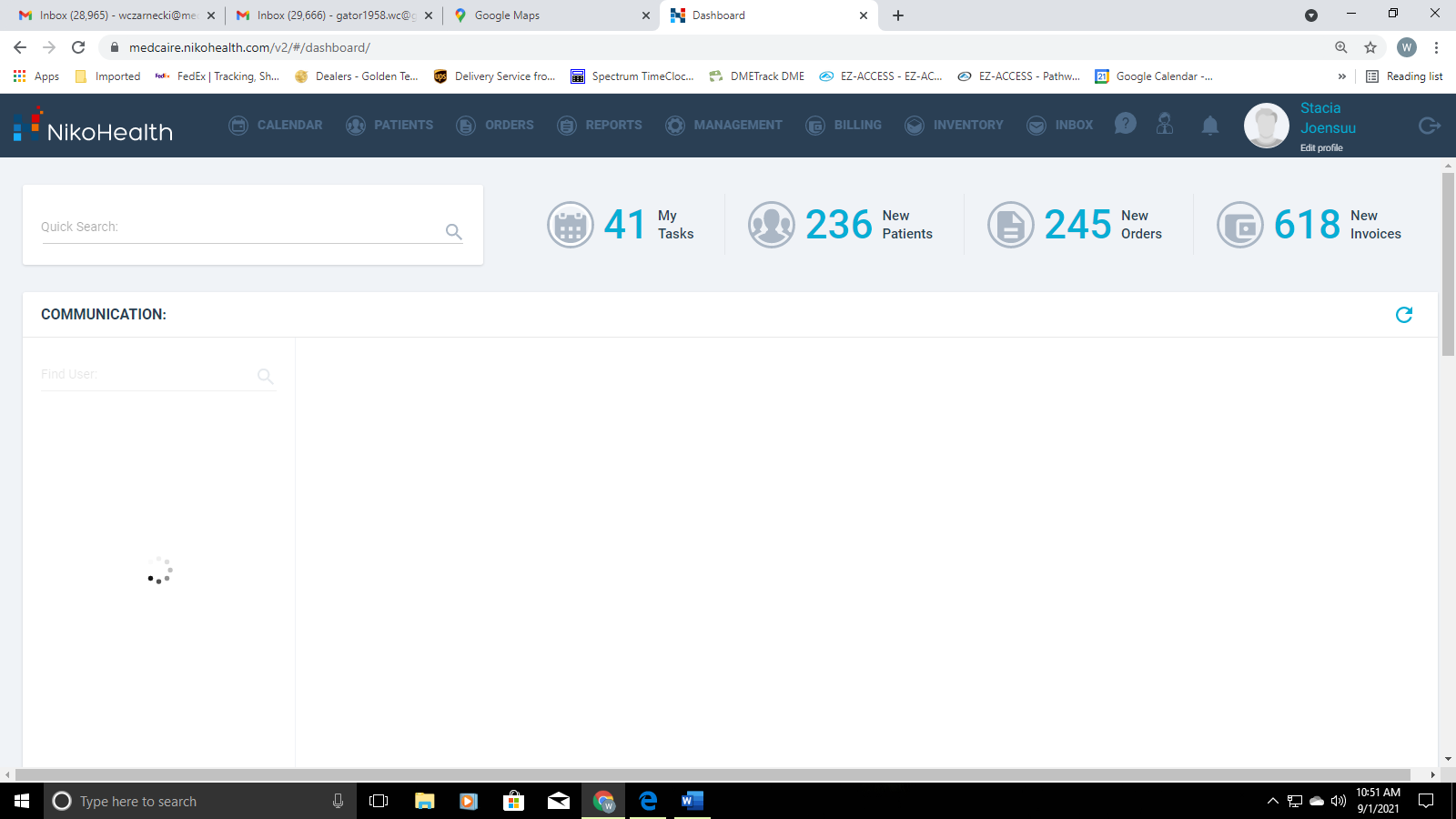
11- Once you’re done with a Task, using the "Blue Plus Sign" select "Complete Task" from the drop-down menu. You will be prompted with "Task Completed?" and you want to select "All Set" to complete the Task.



12- This is what a "Completed Task" should look like



13- To Find you Tasks, From the Dashboard select "My Tasks" from the top menu



14- You can Search Tasks at the top of the screen using "Assigned to me" or "Created by me". You can also Filter your tasks, so you only see the active tasks using the "Status Field drop-down".

A picture containing text, computer, indoor, display

Description automatically generated

15- You can search individual patient tasks by enter the patient’s name, and select the patient you want to see the task(s) for.

A screenshot of a computer

Description automatically generated with medium confidence

16- Select the Task you want to work, and you will be brought into the Task

Graphical user interface, text, application

Description automatically generated

17- This is you’re created task and you can add a note, edit, delete, or complete the task from here.

A screenshot of a computer

Description automatically generated