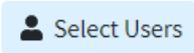


Patient Tasks

† Modified on 06/23/2025 12:33 pm EDT

Add Patient Task

CollaborateMD allows you to create specific tasks associated with your patients. Tasks will help you keep track of items that needs to be completed. Tasks can have due dates, links, descriptions, statuses, and priorities. You can assign tasks to yourself or to specific users within your business.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Locate and click on **Tasks** from the right-hand side panel.
5. Click **Create Task**.
6. Enter the task name in the **Task Title** field.
7. Add the task's **Due Date**, **Status**, and **Priority**.
 - **Low**:  blue down arrow.
 - **Normal**:  Yellow side arrow.
 - **High**:  Red upwards arrow.
8. Write in the **Description** of the task.
9. **Optional**: Click the **Add Link** to link the task to an action. Tasks can be linked to **patient, claim, practice, provider, facility, payer, report, message, or customer**.
10. Enter the username you would like to assign this task to. Or click  and select the user from the list.

 Only users with the **Administer All** permission under administer tasks can edit tasks for other users.

8. Click **Done**.
9. Click **Save**.

 For more information on Tasks, please visit the **Tasks Help Article**.

Change Patient Task Status

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Locate and click on **Tasks** from the right-hand side panel.
5. Click the **Task**.
6. Use the **Status** drop-down menu to assign this task a new status.

 Click the  icon to see view a list showing when and by whom the status of the task was changed.

3. Click **Done**.
4. Click **Save**.

Assign a Patient Task to another User

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Locate and click on **Tasks** from the right-hand side panel.
5. Click the **Task**.
6. Enter the username you would like to assign this task to. Or Click  **Select Users** and select the user from the list.

 All users can create and assign tasks to other users, but you must have the **'Administer All'** permission to modify existing tasks for other users.

7. Click **Done**.
8. Click **Save**.

Delete a Patient Task

 Once a task is permanently deleted, it cannot be restored. Proceed with care.

1. Select **Patient > Patient**.
 2. Use the **Search** field to search through your patients.
 3. Select the **Patient**.
 4. Locate and click on **Tasks** from the right-hand side panel.
 5. Find the task you want to delete.
 6. Click the  icon to the right of the task.
 7. Click **Save**.
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