



# Add Appointment Task


† Modified on 06/23/2025 12:27 pm EDT

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


1. Select **Appointments** > **Scheduler**.
2. Find your appointment.
3. Open the **Appointment**.
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**.
8. Write in the **Description** of the task.

 The task will automatically be linked to the appointment within the task links.

9. **Optional:** Click the **Add Link** to link the task to an additional 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  **Select Users** and select the user or group 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**.

