Claim Tracker Task Options

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CollaborateMD's **Task Options** feature allows users to create specific tasks associated with your claims within claim tracker. Tasks will help you keep track of items that needs to be completed for multiple claims t once. These tasks can have due dates, links, descriptions, statuses, and priorities, and can be assigned to ourself, to specific users within your business, or to groups.

ollow the steps below to create a task from Claim Tracker.

1. Select **Claim** > **Claim Tracker**.
2. Enter your S**earch Criteria** and then click the **Search** button.

   > Change your Tracking Status to **Rejected All** or **Rejected - Not Fixed** to constrain your results by claims that have been rejected.

3. Place a check in the box(es) next to the claim(s) you want to include in the task.
4. Click the **Task Options** button.
5. Select **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 selected claims within the task links.

9. ***Optional***: Click the **Add Link** to link the task to an additional action. Tasks can be linked to a**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 **Save**.

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