


Statement Tracker Task Options

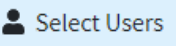
† Modified on 08/01/2025 3:22 pm EDT


CollaborateMD's **Task Options** feature allows users to create specific tasks associated with your statements within statement tracker. Tasks will help you keep track of items that needs to be completed for multiple statements at once. These tasks can have due dates, links, descriptions, statuses, and priorities, and can be assigned to yourself, to specific users within your business, or to groups.

Follow the steps below to create a task from Statement Tracker.


1. Select **Patient > Statement Tracker**.
2. Enter your **Search Criteria** and then click the **Search** button.
3. Place a check in the box(es) next to the statement(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 statements 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, appointment, facility, payer, report, message, or customer**.
10. Enter the username you would like to assign this task to. Or click  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**.

