A/R Control Task Options

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CollaborateMD's **Task Options** feature allows users to create specific tasks associated with your patient's A/R within A/R Control. Tasks will help you keep track of items that needs to be completed for multiple patients 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 A/R Control.

1. Select **Patient** > **A/R Control**.
2. Enter your **Search Criteria** and then click the **Search** button.
3. Place a check in the box(es) next to the patient(s) you want to include in the task.
4. Click the **Task Options** button.
5. Select **Create Task**.

> You also have options to **Reassign** or **Delete** existing Tasks from the Task Options.

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 patients 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**.