

Add Tasks to a Patient's Checklist

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Version 21.1

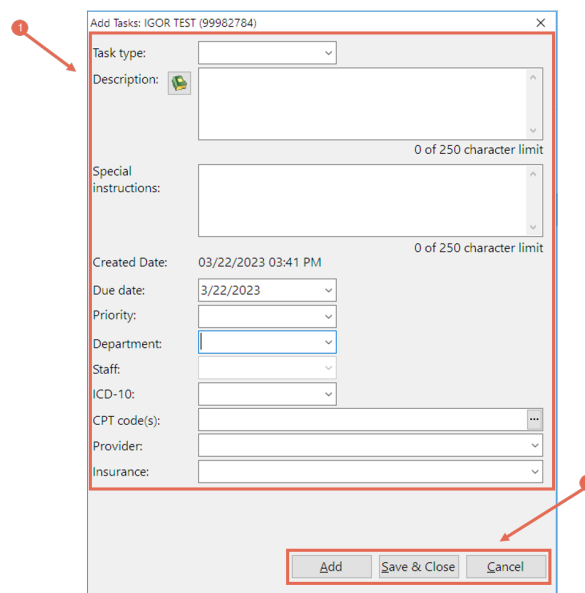


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Add Tasks to a Patient's Checklist

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Tasks > New Task button

The Add Tasks to a Patient's Checklist window is used to create new Tasks for a patient. All Tasks created for a patient are displayed in their chart and in the Tasks window accessible by clicking the Tasks button located in the Clinical, Practice Management, or Billing tab.



Add Tasks to a Patient's Checklist Map

Number	Section	Description
1	Task Information	The Task Information refers to all of the information that should be entered to create a Task for a patient. While only the Task type, Description, and Department fields are required, it is best to complete this window with as much relevant information as possible so that the assigned Department can complete the Task.
2	Action buttons	<ul style="list-style-type: none"> • Add: Saves the Task and opens a blank Task window where you can create an additional Task for the patient. • Save & Close: Saves the Task to the patient's checklist and closes the window. • Cancel: Closes the window without saving the Task.

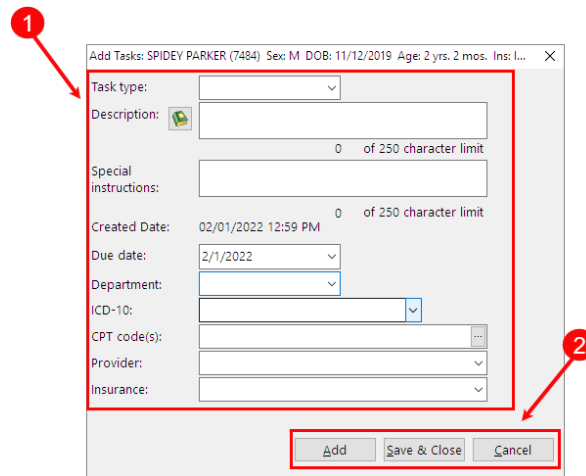


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