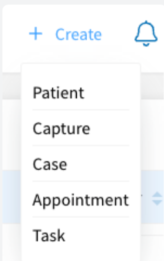
Tasks

Create an efficient workflow and increased accountability within your group or practice

Adding Tasks

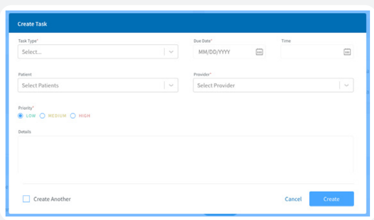


Add tasks from Navigation bar or from + Create at the top of the screen.

Tasks can be added from the patient record or patient appointment.

Required Fields

- Task type
- Due Date
- Provider
- Priority



Click

Create if adding only one task **or**

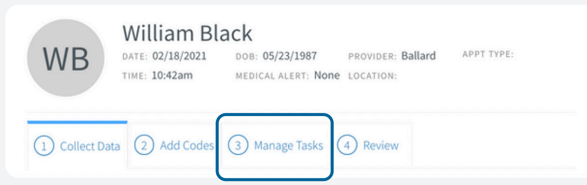
Create Another to add multiple tasks

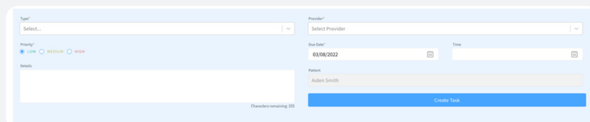
Note: The provider assigned to the task will receive an email alert & the task will appear in the Tasks Panel on their Dashboard.

Once a task has been marked complete, a notification will be sent to the user who assigned the task.

Linking Tasks to Appointment

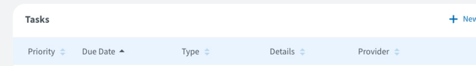
- Within an appointment, select “Manage Tasks”



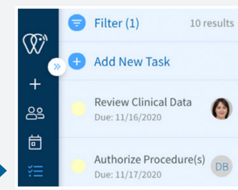


- Enter required fields
  - Note the patient is automatically entered
- Click “create task”
- Once task has been created, refer back to appointment from task by clicking “View” next to “Appointment”

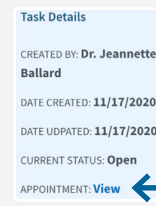
Managing Tasks



All tasks can be seen on the Dashboard. To manage or complete the taks, click the task. This will take you to the Task page.



From Tasks on Navigation Bar, see all tasks, details, and filter to see specific tasks.



If a task is associated with an appointment, a link will be provided in the task detail panel.

Click “**View**” to see the “**Review**” tab within a patient appointment.

Log in to your TeleDent Account at **app.teledent.com**