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**This Quick Reference Guide (QRG) reviews how to add and complete tasks in Netsmart.**

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### Common Buttons & Icons

	<b>Add icon</b>
	<b>Main Menu icon</b>
	<b>Back Arrow icon</b>

### Add and Complete Tasks

#### Access the Main Tasking Screen

The main Tasking screen displays the tasks assigned to you (My Tasks) and the tasks you have delegated to others, for all patients.

➤ From any screen:

**STEP 1:** Tap the **Main Menu** icon.

**STEP 2:** Tap **Tasking**.

- The Tasking screen displays.

#### Access the Tasking Screen from a Patient Chart

Inside a patient chart, the Tasking screen displays tasks concerning the patient.

➤ After opening a patient chart:

**STEP 1:** Tap the **Patient Tasks** tile in the lower left of the screen.

- The Tasking screen displays.

#### Add a Task

➤ From either Tasking screen:

**STEP 1:** Tap the **Add** icon in the lower right of the screen.

**STEP 2:** Complete the **Patient** field.

**Note:** This step is not necessary if you are adding a task from inside a patient chart.

**STEP 3:** Tap the **Task Code** drop-down arrow.

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**STEP 4:** Select the appropriate task code for the task.

**STEP 5:** Tap the Assigned To drop-down arrow.

**STEP 6:** Select the task assignee.

- Type the full or partial name of the staff member or group that this task will be assigned to in the **Search** field.
- Press Enter.
- Select the task assignee from the list of results.

**STEP 7:** Tap anywhere outside the list to return to the screen view.

**STEP 8:** Tap the **Due Date** field.

**STEP 9:** Select the due date for the task; then then tap **Done**.

**STEP 10:** Tap the **Comment** field and enter a note detailing why the task is being created.

**STEP 11:** Tap the **Back Arrow** icon next to Tasking to save the task.

### **Complete a Task**

➤ From either **Tasking** screen:

**STEP 1:** Tap the task requiring completion.

**STEP 2:** Tap the Status drop-down arrow.

**STEP 3:** Tap Completed.