How to Create a Personal Task in Accrecy

Learn how to create a personal task in Accrecy, set a due date and priority, and keep track of things you need to complete from your personal workspace.

Getting Started | Account & Profile | Notifications & Reminders | Frequently Asked Questions

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Personal Tasks help you keep track of things you need to remember, follow up on, or complete.

Tasks are part of your personal Accrecy workspace and are available from the Tasks button in the top navigation.

You can use Personal Tasks for things such as:

- Following up with a provider
- Uploading a credential
- Completing paperwork
- Calling someone
- Scheduling an appointment
- Renewing a certification
- Completing a personal reminder

Open Your Tasks

From anywhere in your Accrecy workspace, select Tasks from the top navigation.

This opens your Personal Tasks area.

From here, you can review your existing tasks and create new ones.

Create a New Task

From the Tasks page, select New Task.

This opens the Create Task page where you can enter the details of what you need to complete.

Enter the Task Title

In the Task Title field, enter a short and clear name for the task.

Examples include:

- Upload CPR Certificate
- Call Provider Office
- Complete I-9
- Renew Driver’s License
- Follow Up on Application
- Schedule Appointment

The Task Title is required.

Keep the title simple enough that you can quickly understand what the task is when viewing your task list.

Add a Description

Use the Description field to add any additional details or notes about the task.

You may use this section to include:

- Instructions
- Contact information

- Documents you need
- Follow-up details
- Important notes
- Steps needed to complete the task

The Description field is optional.

Add enough information to help you understand what needs to be done when you return to the task later.

Set a Due Date and Time

If the task needs to be completed by a specific date, select a Due Date & Time.

This can help you keep track of tasks that have deadlines.

The due date and time are optional.

If the task does not have a specific deadline, you can leave this field blank.

Choose a Priority

Use the Priority field to indicate how much attention the task requires.

For most tasks, you can leave the priority set to Normal.

Use a higher priority when the task is more important or requires your attention sooner.

Save the Task

Once you have entered the task information, review the details and select Create Task.

Accrecy will save the task and add it to your Personal Tasks area.

You can return to Tasks at any time to review the things you still need to complete.

Personal Tasks Are for You

Personal Tasks are designed to help you organize your own reminders and responsibilities.

They are separate from provider schedules, work assignments, documents, patient or individual responsibilities, and other provider-managed activities.

For example, you may create a Personal Task to:

- Remember to renew a certification
- Call the office tomorrow
- Upload an updated credential
- Follow up about an application
- Complete paperwork before a deadline

Your Personal Tasks remain part of your personal Accrecy workspace.

Need the Task to Repeat?

If the same task needs to happen regularly, you can create a Recurring Task instead.

Recurring Tasks can be useful for responsibilities that repeat:

- Daily
- Weekly
- Every two weeks
- Monthly
- Yearly

Use a regular Personal Task when you only need to complete something once.

Use a Recurring Task when the same responsibility needs to repeat on a schedule.

Keep Your Tasks Organized

To get the most from Personal Tasks:

- Use clear and specific task titles

- Add a due date when something has a deadline
- Include helpful details in the description
- Use priority for tasks that need extra attention
- Review your Tasks area regularly
- Use Recurring Tasks for responsibilities that happen repeatedly

Personal Tasks give you one place inside Accrecy to keep track of things you need to get done.
