



Visit Task



A Visit Task refers to a specific set of responsibilities and activities performed by a caregiver during a patient's Day Care.



Note: All Fields marked with * are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.



Adding Visit Task


Settings >> Visit Task >> +Add option



 SETTINGS 


 AGENCY 


 CASE MANAGER 


 FACILITY HOUSE 



 DOCUMENT MANAGEMENT



 DX CODE 



 DROPDOWN EDITOR



 ORG PREFERENCE



 ORGANIZATION FORMS


 PAYOR 


 PHYSICIAN 

 PREFERENCE/SKILL 

 SERVICE CODE 

 VISIT TASK 

 ADD

 LIST

The user can update the task details in the required fields and Click Save option.

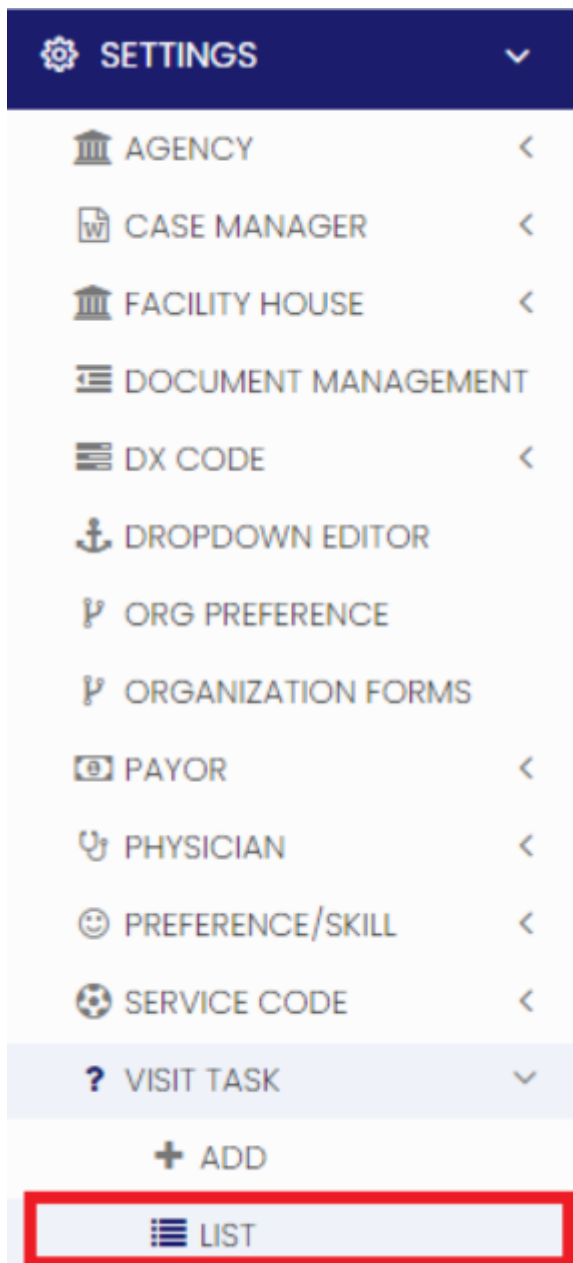
Task Detail

Task Type ? *	Select Task Type	
Service	Select	
Task Code ?	Task Code	
Category ?	Select Category	+
Sub Category ?	Select Sub Category	+
Task Detail ? *	Enter Task Detail	
Is Required? ?	No	
Default Frequency ?	Select Frequency	
Is Default? ?	No	
Task Option ?	Select Task Option	
Default Task Option ?	No	

Save Cancel

Editing Visit Task

Settings >> Visit Task >> List



Select the task from the list using the checkbox and Click Edit option on the right side of the screen.

VISIT TASK LIST										
<div><div>Refresh</div><div>Active</div><div>Delete Selected</div><div>CloneTask</div><div>+ Visit Task</div><div>Select Bulk Type</div><div>Bulk Update</div></div>										
Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action	
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Adult C	Service Code				Search	Reset
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes				
<input type="checkbox"/> Other	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				
<input type="checkbox"/> Gardening/Horticultural	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				
<input checked="" type="checkbox"/> Independent Project	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				
<input type="checkbox"/> Special Group Projects	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				
<input type="checkbox"/> Field Trips	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				
<input type="checkbox"/> Beauty/Barber Shop	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes				

Showing 1 to 7 of 7 records

Now, Edit the required information and Click Update option.

Task Detail

Task Type ? *	Task	▼
Visit Type *	Non Clinical	▼
Service *	Adult Day Care	▼
Task Code ?	1	
Service Code ?	S5102	×
Category ?	Daily Activities	▼ +
Sub Category ?	Select Sub Category	▼ +
Task Detail ? *	Independent Project	
Is Required? ?	No	▼
Minimum Time Required ?	Minimum Time Required	Minutes
Default Frequency ?	Select Frequency	▼
Is Default? ?	Yes	▼
Task Option ?	Select Task Option	▼
Default Task Option ?	No	▼

Update

Cancel

Delete Visit Task

[Settings >> Visit Task >> List](#)

Select the Visit Task from list using the check box and click Delete or Disable Selected option in the screen.

VISIT TASK LIST

[Refresh](#) [Active](#) [Delete Selected](#) [CloneTask](#) [+ Visit Task](#) [Select Bulk Type](#) [Bulk Update](#)

Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category ▼	Select ▼	Select ▼	Adult Day Care ▼	Service Code				Search Reset
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes			Edit Delete
<input type="checkbox"/> Other	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete
<input type="checkbox"/> Gardening/Horticultural	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete
<input checked="" type="checkbox"/> Independent Project	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete
<input type="checkbox"/> Special Group Projects	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete
<input type="checkbox"/> Field Trips	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete
<input type="checkbox"/> Beauty/Barber Shop	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			Edit Delete

Now, the Visit Task gets deleted and we can view the Visit Task under Deleted list.

VISIT TASK LIST

Refresh

Deleted

CloneTask

+ Visit Task

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Adult C	Service Code				<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Bathing	N/A	Task	Non Clinical	Adult Day Care	N/A	No			<div>🔗</div> <div>Active</div>
<input type="checkbox"/>	Independent Project	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>Active</div>

The user can also Restore the deleted Visit Task by using the option Active on the right side of the screen.

VISIT TASK LIST

Refresh

Deleted

Active Selected

CloneTask

+ Visit Task

Select Bulk Type

Bulk Update

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Adult C	Service Code				<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Bathing	N/A	Task	Non Clinical	Adult Day Care	N/A	No			<div>🔗</div> <div>Active</div>
<input checked="" type="checkbox"/>	Independent Project	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>Active</div>

Clone Task

Settings >> Visit Task >> List

The user can create the same Visit Task details for different service code by using the option Clone Task.

Select the Visit Task and click Clone Task on the screen.

VISIT TASK LIST

Refresh

Active

Delete Selected

CloneTask

+ Visit Task

Select Bulk Type

Bulk Update

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Adult C	Service Code				<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes			<div>🔗</div> <div>🗑</div>
<input type="checkbox"/>	Other	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>🗑</div>
<input type="checkbox"/>	Gardening/Horticultural	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>🗑</div>
<input type="checkbox"/>	Special Group Projects	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>🗑</div>
<input checked="" type="checkbox"/>	Field Trips	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>🗑</div>
<input type="checkbox"/>	Beauty/Barber Shop	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes			<div>🔗</div> <div>🗑</div>

Now, the clone task screen appears. Select the Target service from the List and click Clone option.

Clone task

Target Service

Nurse Assessment

Target Service Code

Select

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required
<input checked="" type="checkbox"/>	Field Trips	Daily Activities	Task	Non Clinical	Adult Day Care	S5102	Yes		

Clone

Close

Now the new Visit task is created with Service name Nurse Assessment in the List.

VISIT TASK LIST										
<div><div>Refresh</div><div>Active</div><div>CloneTask</div><div>+ Visit Task</div></div>										
	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Select	Service Code				<div>SearchReset</div>
<input type="checkbox"/>	Field Trips	Daily Activities	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Health and Medical	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Personal Hygiene	Activities of Daily Living	Task	Non Clinical	Personal care	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes			<div><div></div><div></div></div>

Bulk Update

Settings >> Visit Task >> List

The user can Bulk update the Task details like Visit Type, Task Type, Care Type and Service Code by using the option Bulk Update.

Select the Visit Task by using the check box and click Select Bulk Type option.

VISIT TASK LIST										
<div><div>Refresh</div><div>Active</div><div>Delete Selected</div><div>CloneTask</div><div>+ Visit Task</div><div>Select Bulk Type</div><div>Bulk Update</div></div>										
	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Select	Service Code				<div>SearchReset</div>
<input type="checkbox"/>	Field Trips	Daily Activities	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input checked="" type="checkbox"/>	Health and Medical	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Personal Hygiene	Activities of Daily Living	Task	Non Clinical	Personal care	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes			<div><div></div><div></div></div>

Now, select the Category from the list and the related options and then click Bulk Update option.

VISIT TASK LIST

Refresh

Active

Delete Selected

CloneTask

+ Visit Task

Care Type

Select

Bulk Update

Task Detail	Category	Task Type	Visit Type	Service	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Select				Search Reset
<input type="checkbox"/> Field Trips	Daily Activities	Task	Non Clinical	Nurse Assessment	N/A	Yes		
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes		
<input checked="" type="checkbox"/> Health and Medical	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes		
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Non Clinical	Personal care	N/A	Yes		
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes		

The required Category has been added in the list.

VISIT TASK LIST

Refresh

Active

CloneTask

+ Visit Task

Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
<input type="checkbox"/> Field Trips	Daily Activities	Task	Non Clinical	Nurse Assessment	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non Clinical	Nurse Assessment	N/A	Yes			
<input type="checkbox"/> Health and Medical	Activities of Daily Living	Task	Non Clinical	Adult Day Care	N/A	Yes			

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