

# Task Mapping

**Client >> List >> Select Patient from List >> Care Plan >> Task Mapping.**

Patient Details
Documents
Billing/Prior Authorization
**Care Plan**
Calendar
Block Employees
Internal Messaging
Notes

Tasks Mapping

Patient Schedule

Task

Personal Care

+ Goal

Print care plan

[illegible]

# Patient Schedule

The patient schedule can be added in the system by using the option +Add Patient Schedule option. Click schedule option under client.

**Client >> List >> Select Patient from List >> Care Plan >> Patient Schedule or Client >> Schedule**

The patient schedule can be created in the system with Prior Authorization and also without Prior Authorization.

Now lets update the Patient schedule With Prior Authorization. Click on the dropdown option under Contract / PA Details. Select the Authorization details and Click Save & Add Time Slot option.

☒ With PriorAuth  ☐ Without PriorAuth 

Contract/PA Details:\*

Select (Optional)

AuthCode:4354545 CareType:Personal Care ServiceCode:T1019  
StartDate:3/5/2023 12:00:00 AM EndDate:8/31/2023 12:00:00 AM

## Add Time Slot

Day\*

Select Day

Start Time\*

Start Time

End Time\*

End Time

☐ Anytime ClockIn

☐ Used in Scheduling

Notes

'Notes'

Add

## ADD PATIENT SCHEDULE

☒ With PriorAuth  ☐ Without PriorAuth 

### Contract/PA Details:\*

4354545

Start Date: 2023/03/05

End Date: 2023/08/31

Care Plan: Personal Care

Service Code: T1019

Total Used Unit:

Allocated Unit:

Used Unit:

Unused Unit:

Save & Add Time Slots

Select days under the Add Time Slot option, update the Start Time and End Time of the Schedule, Check the option Used in Scheduling and Click Add. Now the Time slot will be generated with Days, Time and Care Plan.

## Add Time Slot

Day\*

Select Day

Start Time\*

Start Time

End Time\*

End Time

☐ Anytime ClockIn




☒ Used in Scheduling

Notes

'Notes'

Add

Delete Selected

| <input type="checkbox"/> | Day ^     | Start Time | End Time | Care Type     | Used in Scheduling | Anytime ClockIn | Notes | Action  |
|--------------------------|-----------|------------|----------|---------------|--------------------|-----------------|-------|---|
| <input type="checkbox"/> | Sunday    | 09:00 AM   | 10:10 AM | Personal Care | ✓                  | ✗               |       |  |
| <input type="checkbox"/> | Monday    | 09:00 AM   | 10:10 AM | Personal Care | ✓                  | ✗               |       |  |
| <input type="checkbox"/> | Tuesday   | 09:00 AM   | 10:10 AM | Personal Care | ✓                  | ✗               |       |  |
| <input type="checkbox"/> | Wednesday | 09:00 AM   | 10:10 AM | Personal Care | ✓                  | ✗               |       |  |

If the Prior Authorization details are not available, the user can follow the above steps and create the Schedule without Prior Authorization for the Patient.

## ADD PATIENT SCHEDULE

☐ With PriorAuth ? ☒ Without PriorAuth ?

Referral\*

Hernandez, Brown

Service\*

Select

Billing/Prior Authorization\*

Start Date\*



mm/dd/yyyy



☐ End By

Save & Add Time Slots


Select days under the Add Time Slot option, update the Start Time and End Time of the Schedule, Check the option Used in Scheduling and Click Add. Now the Time slot will be generated with Days, Time and Care Plan.

☐ With PriorAuth  ☒ Without PriorAuth 

**Referral\***  
Hernandez, Brown

**Service\***  
Personal Care

**Billing/Prior Authorization\***

**Start Date\***  
10/01/2023 

☐ End By

Update Schedule

### Add Time Slot

**Day\***  
Select Day

**Start Time\***  
Start Time

**End Time\***  
End Time

Type in a search term

Sunday  
Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
Saturday

☒ Used in Scheduling

Add

Now, the Time Slot for the patient is successfully added with the required Days and Time.

☐ With PriorAuth  ☒ Without PriorAuth 

## Referral\*

Hernandez, Brown

## Service\*

Personal Care

## Billing/Prior Authorization\*

## Start Date\*

10/01/2023

☐ End ByUpdate Schedule

## Add Time Slot

## Day\*

Select Day

## Start Time\*

Start Time

## End Time\*




End Time

☐ Anytime ClockIn☒ Used in Scheduling

## Notes

Notes

AddDelete Selected

| <input type="checkbox"/> | Day ^     | Start Time | End Time | Service       | Used in Scheduling | Anytime ClockIn | Notes | Action  |
|--------------------------|-----------|------------|----------|---------------|--------------------|-----------------|-------|---|
| <input type="checkbox"/> | Monday    | 08:00 AM   | 10:00 PM | Personal Care | ✓                  | ✗               |       |  |
| <input type="checkbox"/> | Tuesday   | 08:00 AM   | 10:00 PM | Personal Care | ✓                  | ✗               |       |  |
| <input type="checkbox"/> | Wednesday | 08:00 AM   | 10:00 PM | Personal Care | ✓                  | ✗               |       |  |

Showing 1 to 3 of 3 records

## Scheduling Patient with Employee



After creating the Timeslot for the patient, the user has to schedule the patient with the Employee. Click Add Patient Schedule option.

Client >> List >> Select Patient from List >> Care Plan >> Patient Schedule

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

Tasks MappingPatient Schedule

Hernandez, BrownAdd Patient Schedule

NewLegacy

Active

| Start Date | End Date | Service       | Authorization | Information   | Action                  |
|------------|----------|---------------|---------------|---------------|-------------------------|
| 10/01/2023 | N/A      | Personal Care |               | Mon, Tue, Wed | <div>Schedule Now</div> |

Showing 1 to 1 of 0 records

Select the Care Type, Start Date and End Date and days of the schedule. Now select the employee from the list to whom the patient has to be scheduled and click the Schedule option.

HERNANDEZ, BROWN

EmployeeEmployee

SkillsAll Skills

PreferenceAll Preferences

Mile RadiusMile Radius

SortSort

Search

| Employee        | Sort                  |                                   |
|-----------------|-----------------------|-----------------------------------|
| Toth, Alex      | <div>0%0%+18337</div> | <div>+ Schedule+ Reschedule</div> |
| Garcia, William | <div>0%0%+06</div>    | <div>+ Schedule+ Reschedule</div> |
| D, David        | <div>0%0%+9220</div>  | <div>+ Schedule+ Reschedule</div> |

Showing 1 to 3 of 3 records

AuthCode:254874587ServiceCode:11019

CareType:Personal Care

Allocated:Unallocated:

Available:Remaining:

StartDate:02/02/2023EndDate:11/05/2023

Patient's Visit Frequency

Patient PayorAtenaServicePersonal Care

Authorization Code254874587Is Virtual Visit?

Start Date02/02/20End Date11/05/2023

|                          | Day       | Start Time | End Time |  |
|--------------------------|-----------|------------|----------|--|
| <input type="checkbox"/> | Monday    | 08:00 AM   | 10:00 PM |  |
| <input type="checkbox"/> | Tuesday   | 08:00 AM   | 10:00 PM |  |
| <input type="checkbox"/> | Wednesday | 08:00 AM   | 10:00 PM |  |

Patient On Hold+ Patient Hold

The patient has been successfully scheduled with the employee and the Schedule has been created.

Reassign Employee for the patient

The Employee assigned for the patient can be reassigned with different employee in the system by using the Schedule Now option.

## Client >> Schedule

Select the patient from the list and click Schedule now option. When we click the day of the schedule, we can see the employee name who has been assigned to the patient for the day.

CLARK, SAMUEL

Employee  
Employee

Skills All Skills

Preference All Preferences

Mile Radius  
Mile Radius

Sort  
Sort

Search

| Employee        | Sort             |            |              |
|-----------------|------------------|------------|--------------|
| D, David        | 0%  0%  +2478  0 | + Schedule | + Reschedule |
| Garcia, William | 0%  0%  +2228  0 | + Schedule | + Reschedule |
| Toth, Alex      | 0%  0%  +396  0  | + Schedule | + Reschedule |

Showing 1 to 3 of 3 records

View Assigned Employees

| Name      | Mobile Number  |
|-----------|----------------|
| Alex Toth | (347) 480-9560 |

AuthCode:091201983103821

ServiceCode:11019

CareType:Personal Care

Allocated: Unallocated:

Available: Remaining:

StartDate:09/20/2023

EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor  
Atena

Service\*  
Personal Care

Authorization Code  
091201983103821

Is Virtual Visit? beta

Start Date  
09/20/2023

End Date  
01/24/2024

| <input type="checkbox"/> | Day       | Start Time | End Time |  |
|--------------------------|-----------|------------|----------|--|
| <input type="checkbox"/> | Monday    | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/> | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/> | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/> | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold

+ Patient Hold

Now select the start date and end date of the schedule for which the employee has to be reassigned. Also click the check box to select the day for reassigning the employee and click unassign employee option on the right side of the day.

The below screen appears, click yes continue option. The employee has been unassigned for the selected date range for that particular day.

CLARK, SAMUEL

Employee  
Employee

Skills All Skills

Preference All Preferences

undefined

Are you sure?

Cancel Yes, Continue...

| Employee        | Sort             |            |              |
|-----------------|------------------|------------|--------------|
| D, David        | 0%  0%  +2478  0 | + Schedule | + Reschedule |
| Garcia, William | 0%  0%  +2228  0 | + Schedule | + Reschedule |
| Toth, Alex      | 0%  0%  +396  0  | + Schedule | + Reschedule |

Showing 1 to 3 of 3 records

AuthCode:091201983103821

ServiceCode:11019

CareType:Personal Care

Allocated: Unallocated:

Available: Remaining:

StartDate:09/20/2023

EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor  
Atena

Service\*  
Personal Care

Authorization Code  
091201983103821

Is Virtual Visit? beta

Start Date  
10/14/2023

End Date  
01/24/2024

| <input type="checkbox"/>            | Day       | Start Time | End Time |  |
|-------------------------------------|-----------|------------|----------|--|
| <input checked="" type="checkbox"/> | Monday    | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold

+ Patient Hold

After the employee has been unassigned, click the check box for the day and click Schedule option on the right side of the employee who has to be scheduled for the patient.

CLARK, SAMUEL

Employee

Employee

Skills All Skills

Preference All Preferen

Mile Radius

Mile Radius

Sort

Sort

Search

| Employee        | Sort          |                         |
|-----------------|---------------|-------------------------|
| D, David        | 0% 0% +2476 0 | + Schedule + Reschedule |
| Garcia, William | 0% 0% +2228 0 | + Schedule + Reschedule |
| Toth, Alex      | 0% 0% +396 0  | + Schedule + Reschedule |

Showing 1 to 3 of 3 records

Schedule(s) created successfully

AuthCode:091201983103821 CareType:Personal Care Allocated: Available: StartDate:09/20/2023 ServiceCode:11019 Unallocated: Remaining: EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Atena Service\* Personal Care

Authorization Code 091201983103821 Is Virtual Visit? beta

Start Date 09/20/2023 End Date 01/24/2024

|                                     | Day       | Start Time | End Time |  |
|-------------------------------------|-----------|------------|----------|--|
| <input type="checkbox"/>            | Monday    | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/>            | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/>            | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold + Patient Hold

# Patient on Hold

The user can keep the patient on hold for the day by using the option +Patient Hold.

CLARK, SAMUEL

Employee

Employee

Skills All Sk

Preference All Prt

Mile Radius

Mile Radius

Sort

Sort

Search

| Employee        | Sort          |                         |
|-----------------|---------------|-------------------------|
| D, David        | 0% 0% +2476 0 | + Schedule + Reschedule |
| Garcia, William | 0% 0% +2228 0 | + Schedule + Reschedule |
| Toth, Alex      | 0% 0% +396 0  | + Schedule + Reschedule |

Showing 1 to 3 of 3 records

AuthCode:091201983103821 CareType:Personal Care Allocated: Available: StartDate:09/20/2023 ServiceCode:11019 Unallocated: Remaining: EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Atena Service\* Personal Care

Authorization Code 091201983103821 Is Virtual Visit? beta

Start Date 10/16/2023 End Date 10/16/2023

|                                     | Day       | Start Time | End Time |  |
|-------------------------------------|-----------|------------|----------|--|
| <input checked="" type="checkbox"/> | Monday    | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/>            | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/>            | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input type="checkbox"/>            | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold + Patient Hold

Now Click +Patient Hold option, the following screen appears, update the start date, end date, reason for hold and click Save option. The notification will be sent to the employee to hold the patient for the day.

Employee

Employee

Skills

All Sk

Preference

All Pri

| Employee        | Sort          |
|-----------------|---------------|
| D, David        | 0% 0% +2476 0 |
| Garcia, William | 0% 0% +2228 0 |
| Toth, Alex      | 0% 0% +396 0  |

Showing 1 to 3 of 3 records

Patient Hold

Are you sure you want to put this patient on hold for selected dates? This action will delete Patient's Visits for selected dates.

Start Date\*

mm/da/

End Date

mm/da/

Hold Reason\*

Hold Reason

Notify Employee

Cancel

Save

AuthCode:091201983103821

ServiceCode:T1019

CareType:Personal Care

Allocated:

Unallocated:

Available:

Remaining:

StartDate:09/20/2023

EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor

Atena

Service\*

Personal Care

Authorization Code

091201983103821

Is Virtual Visit?

Start Date

10/16/2023

End Date

10/16/2023

|                                     | Day       | Start Time | End Time |  |
|-------------------------------------|-----------|------------|----------|--|
| <input checked="" type="checkbox"/> | Monday    | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold

+ Patient Hold

The user can see days on the screen for which the patient is on hold.

Employee

Employee

Skills

All Sk

Preference

All Pri

Mile Radius

Mile Radius

Sort

Sort

Employee

Sort

|                 |               |                         |
|-----------------|---------------|-------------------------|
| D, David        | 0% 0% +2476 0 | + Schedule + Reschedule |
| Garcia, William | 0% 0% +2228 0 | + Schedule + Reschedule |
| Toth, Alex      | 0% 0% +396 0  | + Schedule + Reschedule |

Showing 1 to 3 of 3 records

AuthCode:091201983103821

ServiceCode:T1019

CareType:Personal Care

Allocated:

Unallocated:

Available:

Remaining:

StartDate:09/20/2023

EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor

Atena

Service\*

Personal Care

Authorization Code

091201983103821

Is Virtual Visit?

Start Date

10/16/2023

End Date

10/16/2023

|                                     | Day       | Start Time | End Time |  |
|-------------------------------------|-----------|------------|----------|--|
| <input checked="" type="checkbox"/> | Monday    | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Wednesday | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Thursday  | 06:00 AM   | 08:00 PM |  |
| <input checked="" type="checkbox"/> | Friday    | 06:00 AM   | 08:00 PM |  |

Patient On Hold

+ Patient Hold

| # | Start Date | End Date   |   |
|---|------------|------------|---|
| 1 | 10/16/2023 | 10/16/2023 | ✕ |

# Virtual Visit

Client >> Schedule

For creating the Virtual Visit of the patient with employee, follow these steps.

- Click the schedule now option.

- Select the Patient Payor, Service and check the option Is Virtual Visit.
- Select the days of the schedule for Virtual Visit.
- Click Schedule option for the required employee in the list.

CLARK, SAMUEL

Employee Skills All Skills Preference Mile Radius Sort Search

| Employee        | Sort        |                         |
|-----------------|-------------|-------------------------|
| Garcia, William | 0% 0% +9311 | + Schedule + Reschedule |
| Toth, Alex      | 0% 0% +9134 | + Schedule + Reschedule |
| D, David        | 0% 0% +8388 | + Schedule + Reschedule |

Showing 1 to 3 of 3 records

Patient's Visit Frequency

Patient Payor Service

Authorization Code

Start Date End Date

| Day       | Start Time | End Time |  |
|-----------|------------|----------|--|
| Sunday    | 07:00 AM   | 02:00 PM |  |
| Monday    | 07:00 AM   | 02:00 PM |  |
| Tuesday   | 07:00 AM   | 02:00 PM |  |
| Wednesday | 07:00 AM   | 02:00 PM |  |
| Thursday  | 07:00 AM   | 02:00 PM |  |
| Thursday  | 03:00 PM   | 10:00 PM |  |
| Friday    | 07:00 AM   | 02:00 PM |  |
| Friday    | 03:00 PM   | 10:00 PM |  |
| Saturday  | 07:00 AM   | 02:00 PM |  |

## Delete Schedule

Client >> Schedule

Click the Delete button before Schedule Now option to Delete the schedules created with wrong information.

Patient Details Documents Billing/Prior Authorization Care Plan Calendar Block Employees Internal Messaging Notes

Tasks Mapping Patient Schedule

Clark, Samuel + Add Patient Schedule

Active

New Legacy

| Start Date | End Date   | Service       | Authorization   | Information                                 | Action       |
|------------|------------|---------------|-----------------|---|--------------|
| 09/01/2023 | N/A        | Respite Care  |                 | Sun, Mon, Tue, Wed, Thu, Fri, Sat, Thu, Fri | Schedule Now |
| 09/20/2023 | 01/24/2024 | Personal Care | 091201983103821 |   | Schedule Now |
| 04/29/2022 | N/A        | Personal Care |                 | Sun, Mon                                    | Schedule Now |

The Deleted schedules can be viewed under Deleted option on the screen.

Patient Details
Documents
Billing/Prior Authorization
Care Plan
Calendar
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Internal Messaging
Notes

Tasks Mapping
Patient Schedule

Clark, Samuel
+ Add Patient Schedule

New
Legacy

Delete

| Start Date | End Date   | Service       | Authorization | Information | Action              |
|------------|------------|---------------|---------------|-------------|---------------------|
| 04/29/2022 | 10/31/2023 | Personal Care |               | Sun, Mon    | Active Schedule Now |

The user can also Activate the Deleted schedules by using the option Active.

Patient Details
Documents
Billing/Prior Authorization
Care Plan
Calendar
Block Employees
Internal Messaging
Notes

Tasks Mapping
Patient Schedule

Clark, Samuel
+ Add Patient Schedule

New
Legacy

Delete

| Start Date | End Date   | Service       | Authorization | Information | Action              |
|------------|------------|---------------|---------------|-------------|---------------------|
| 04/29/2022 | 10/31/2023 | Personal Care |               | Sun, Mon    | Active Schedule Now |