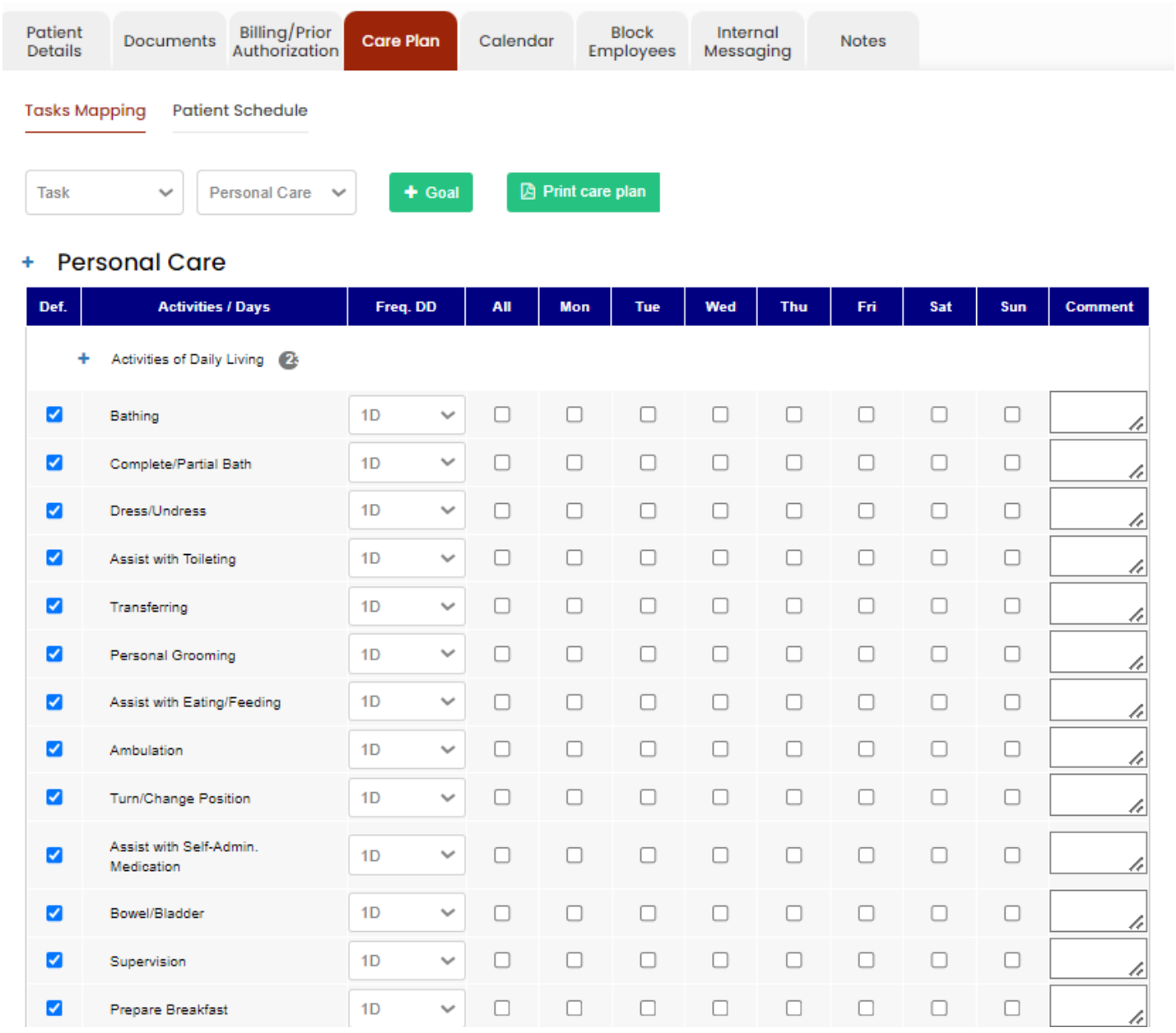
Care Plan

Task Mapping

The visit task activities for care plan can be viewed in Task Mapping option.

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

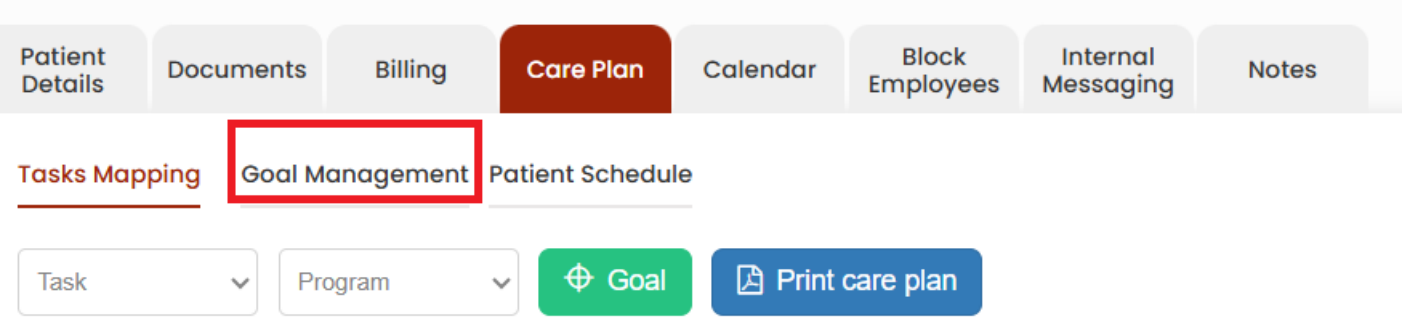
The user can select the Task Activities for the Care type as required for the days of the week.



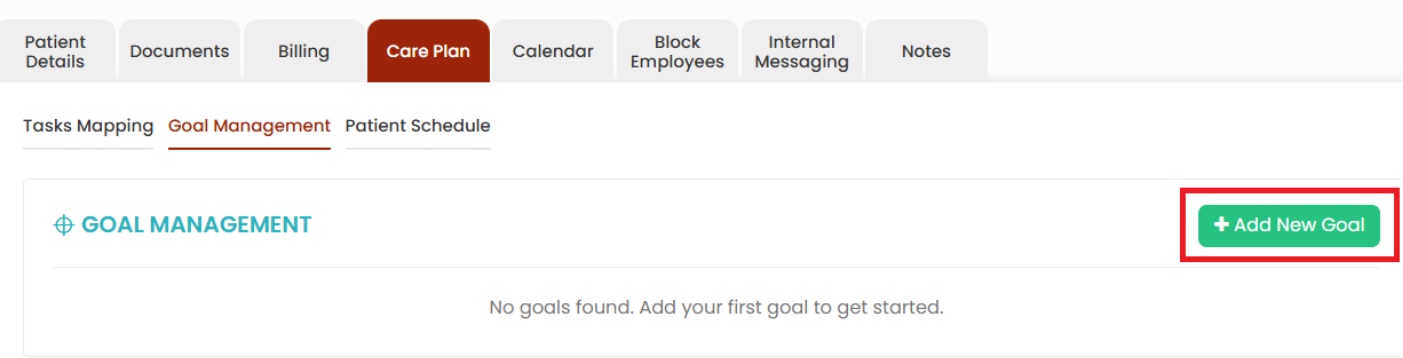
Goal Management

Goal Management is a feature that helps users create, track, and manage individual or program-based goals for clients. It allows setting measurable objectives, assigning responsible staff, monitoring progress, and updating outcomes — ensuring clients receive personalized and outcome-driven care. This feature promotes accountability, documentation, and ongoing evaluation of client progress.

> Client List >> Client >> Care Plan >> Goal Management



Click the option "Goal Management", the following screen appears to add the Goals for the Services of the patient. Click "Add New Goal" option



Now, update the required fields for the Goals and Save the Goal.

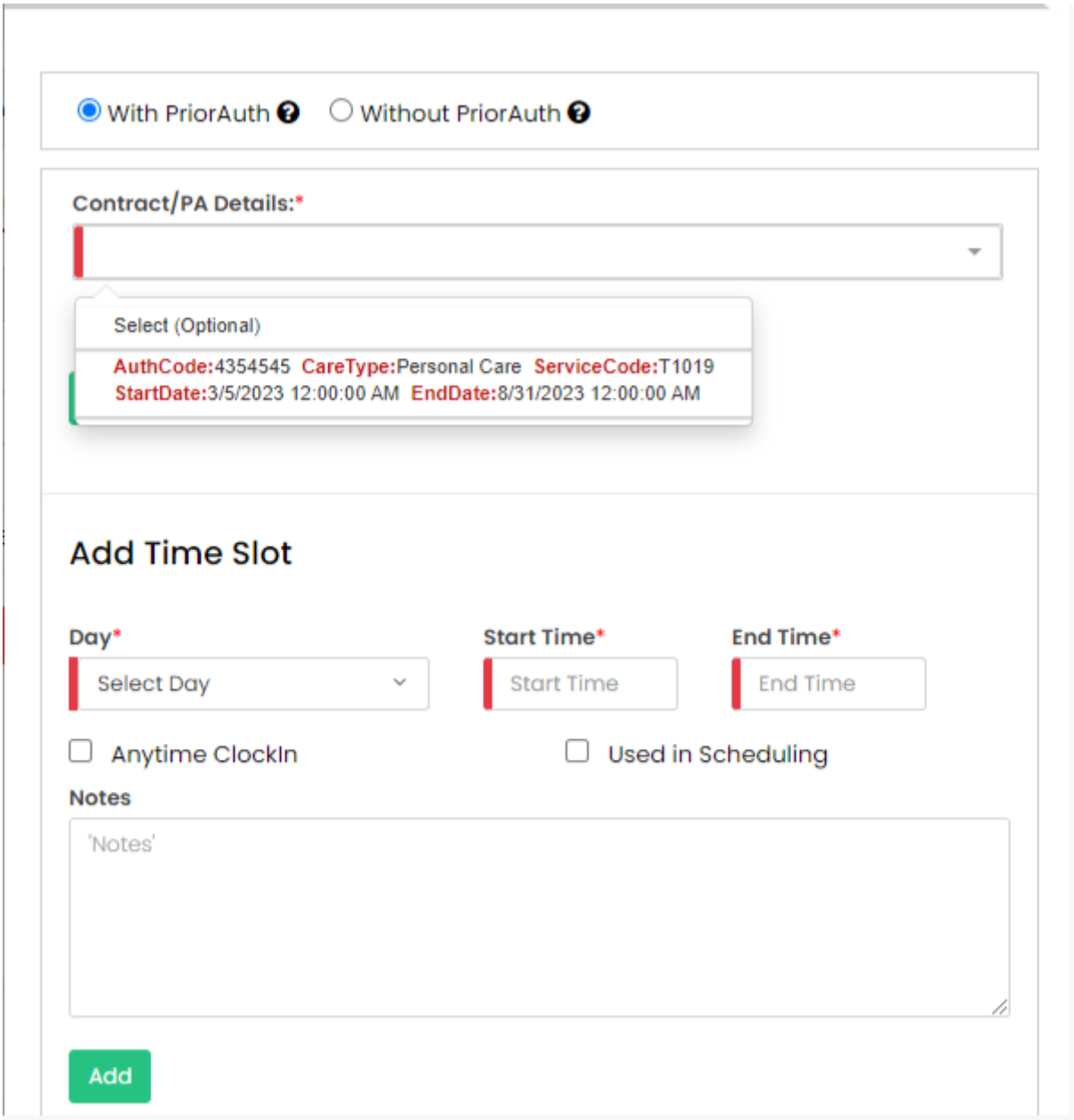
Patient Schedule

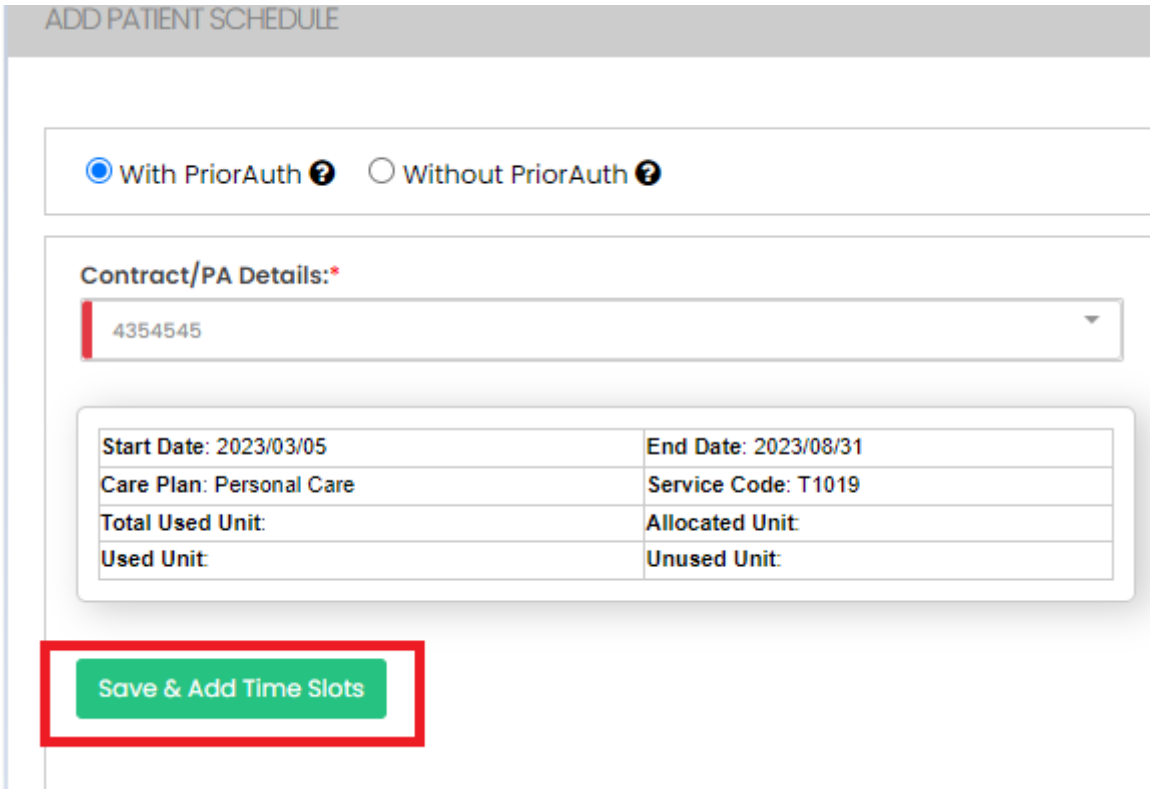
The patient schedule can be added in the system by using the option +Add Patient Schedule option. Click schedule option under client.

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

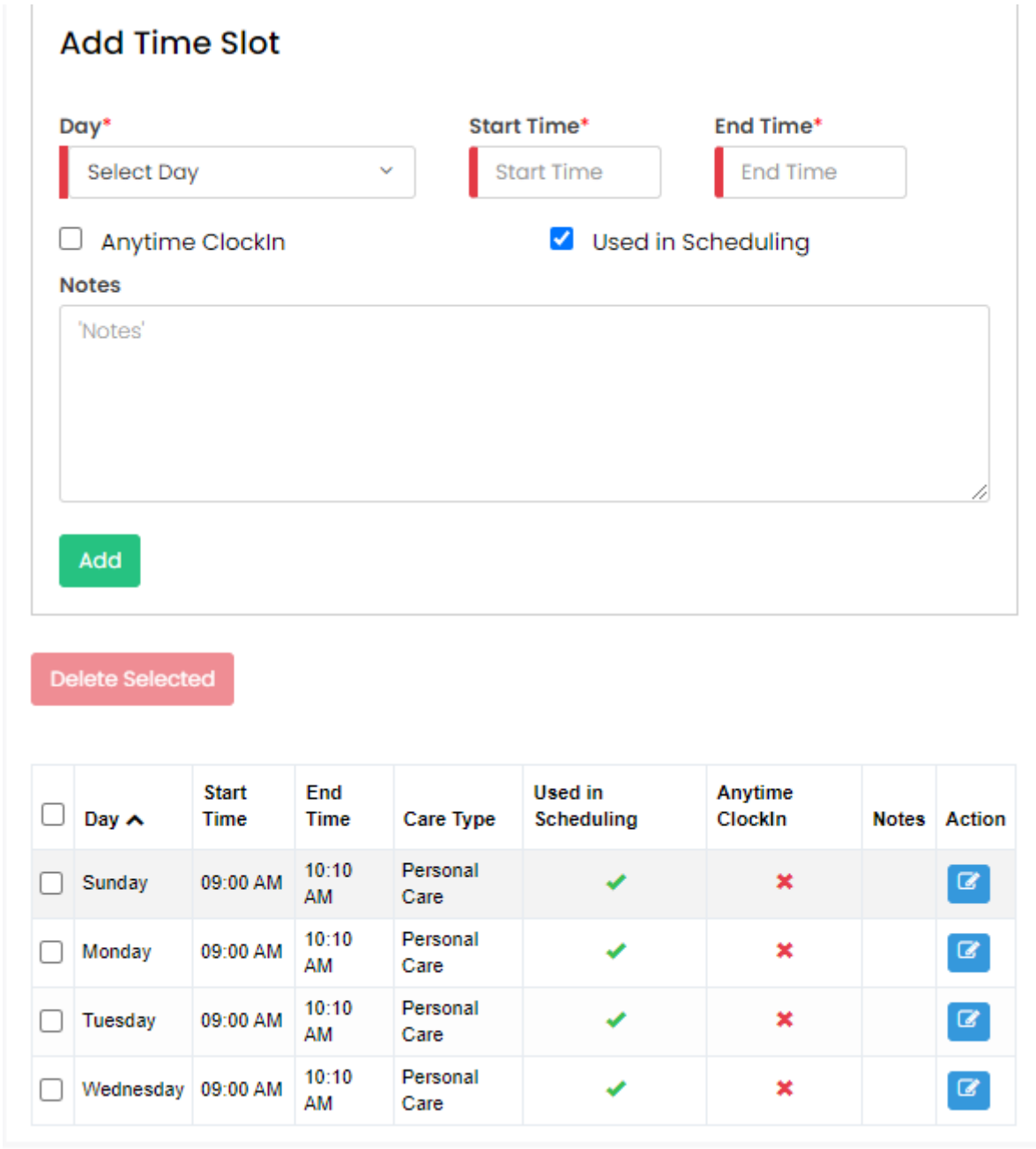
The patient schedule can be created in the system with Prior Authorization and also without Prior Authorization.

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.

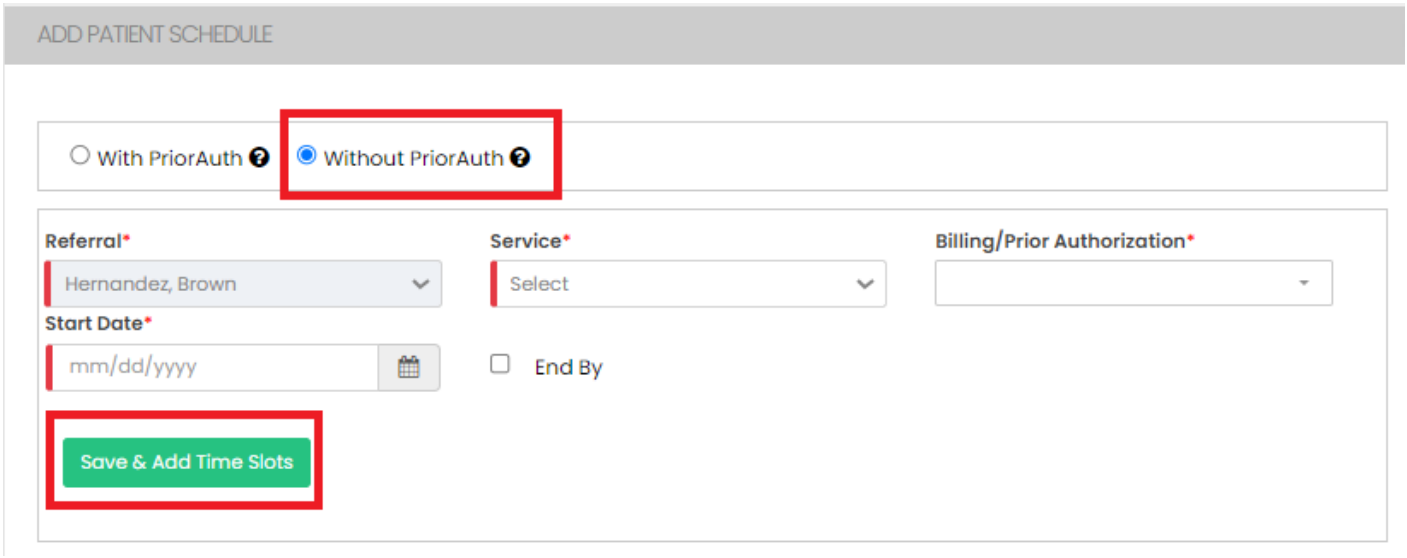




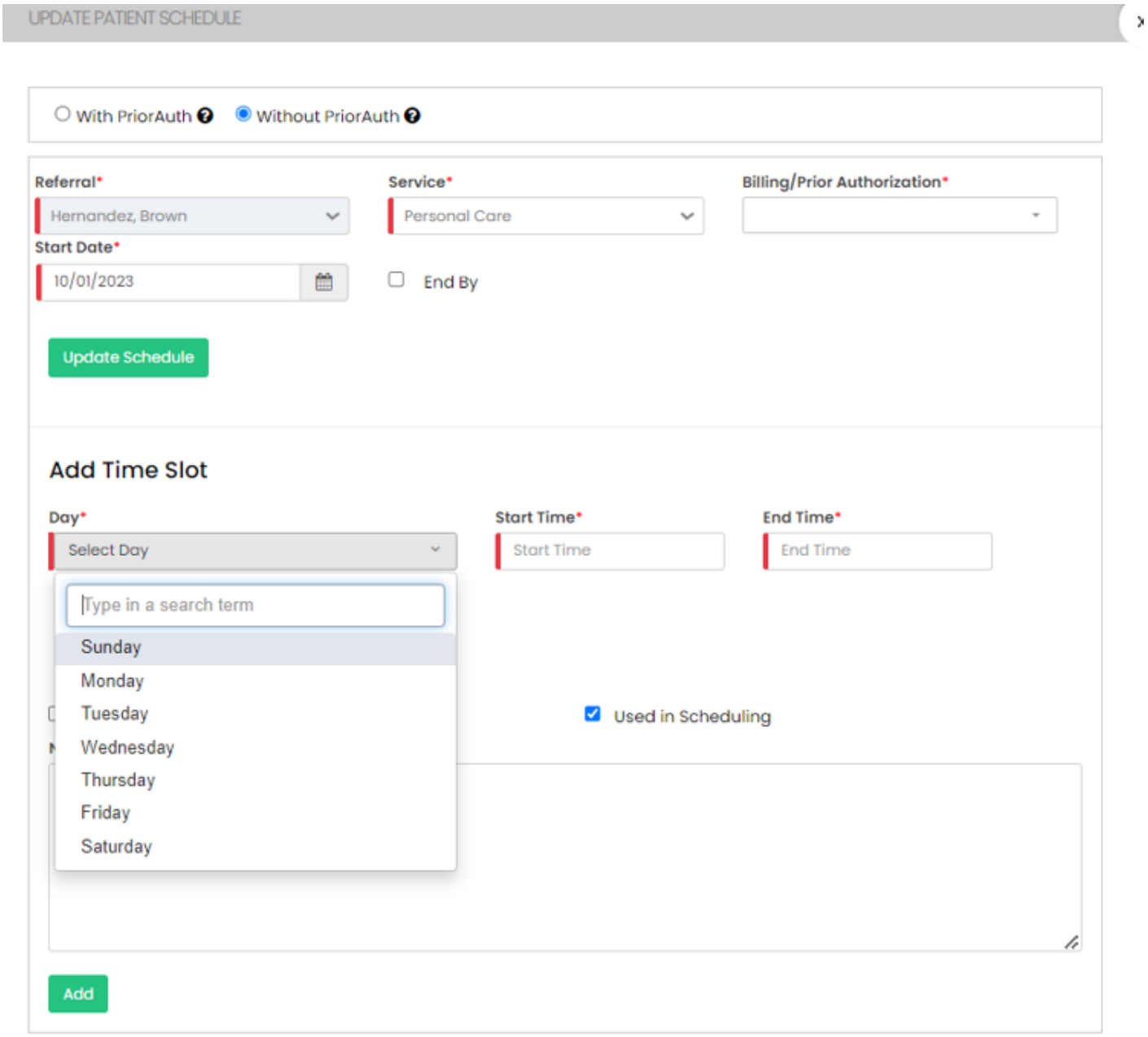
Select days under the Add Time Slot option, update the Start Time and End Time of the Schedule, Check the option Used in Scheduling and Click Add. Now the Time slot will be generated with Days, Time and Care Plan.



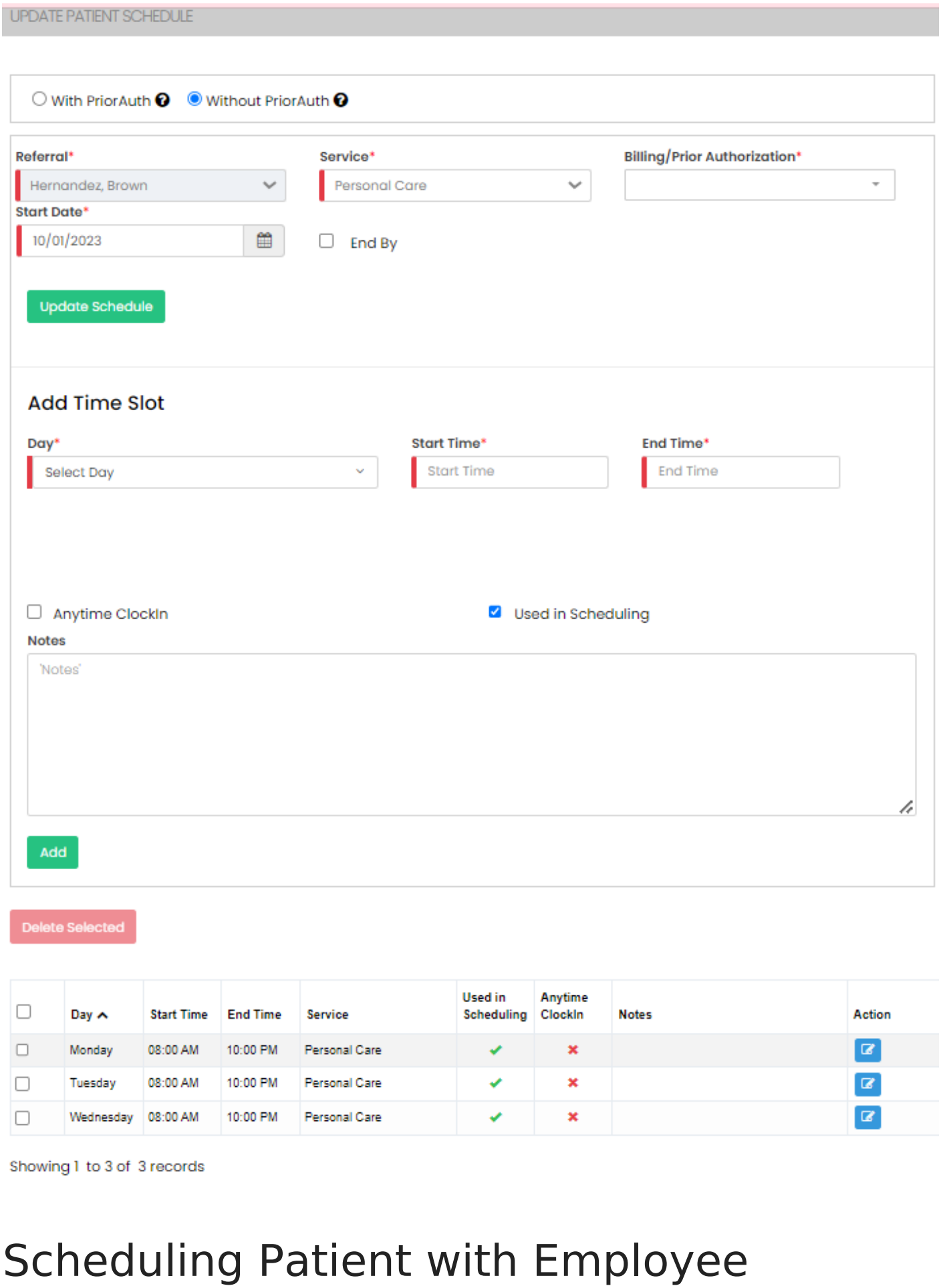
If the Prior Authorization details are not available, the user can follow the above steps and create the Schedule without Prior Authorization for the Patient.



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.



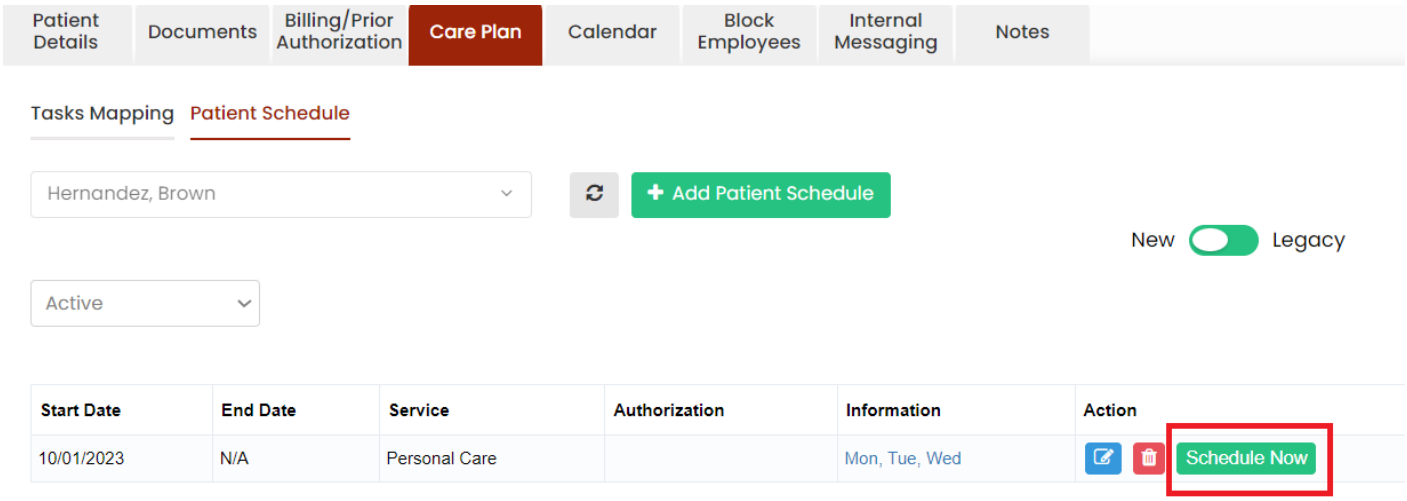
Now, the Time Slot for the patient is successfully added with the required Days and Time.



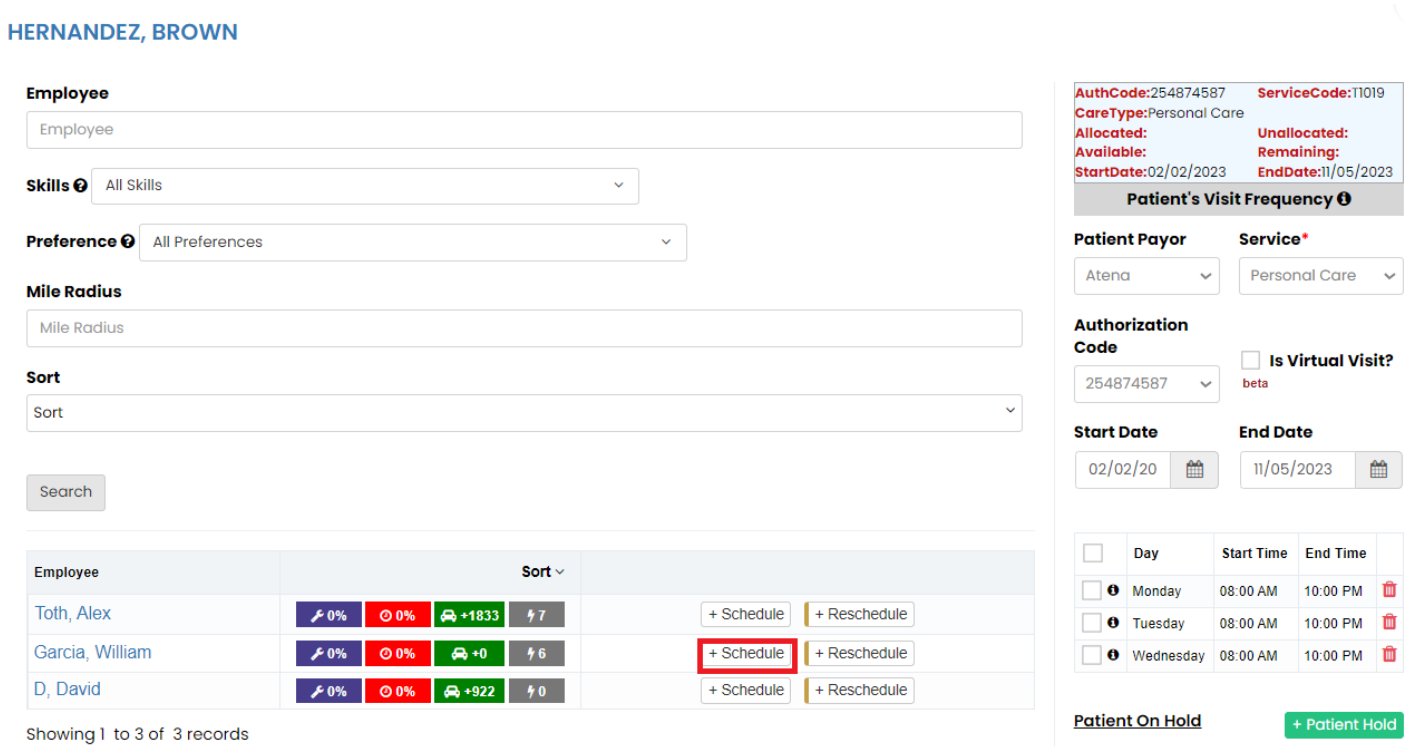
Scheduling Patient with Employee

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



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.



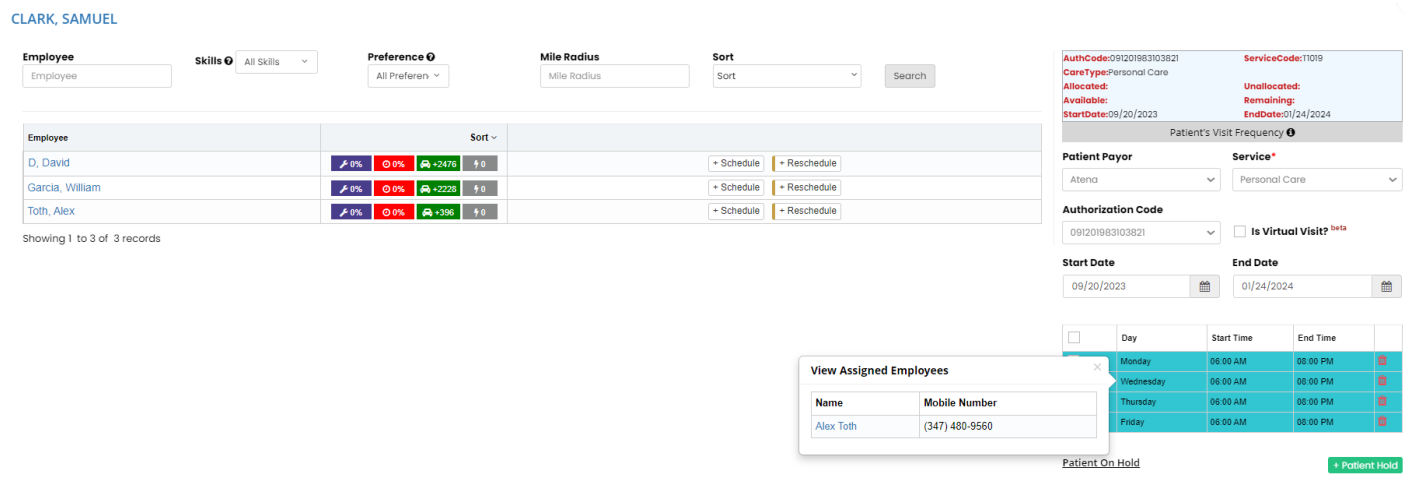
The patient has been successfully scheduled with the employee and the Schedule has been created.

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.

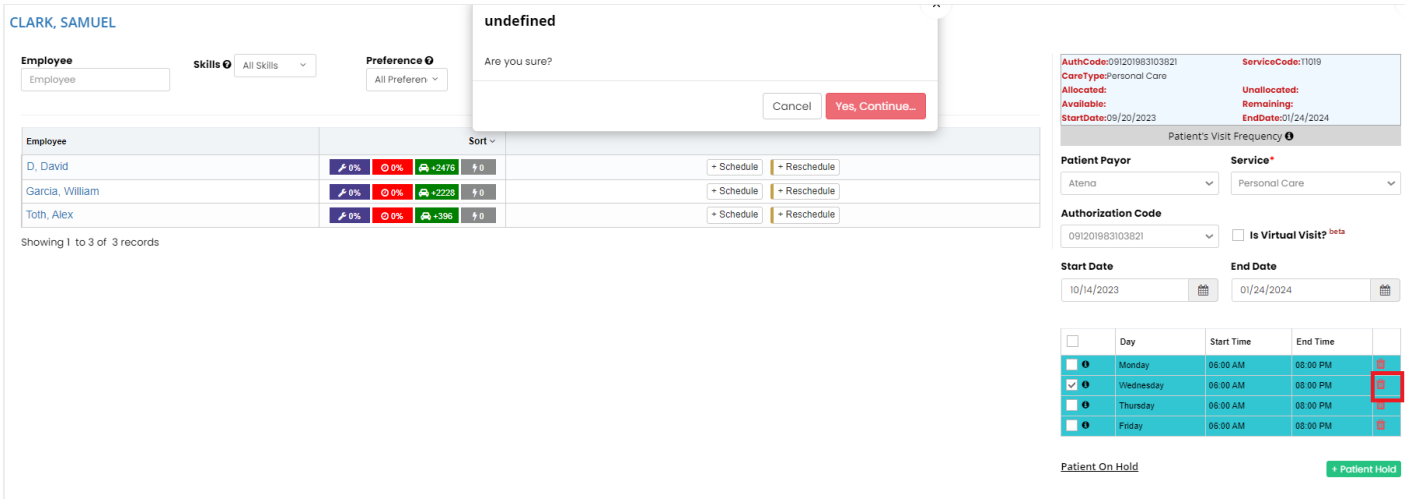
Client >> Schedule

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.

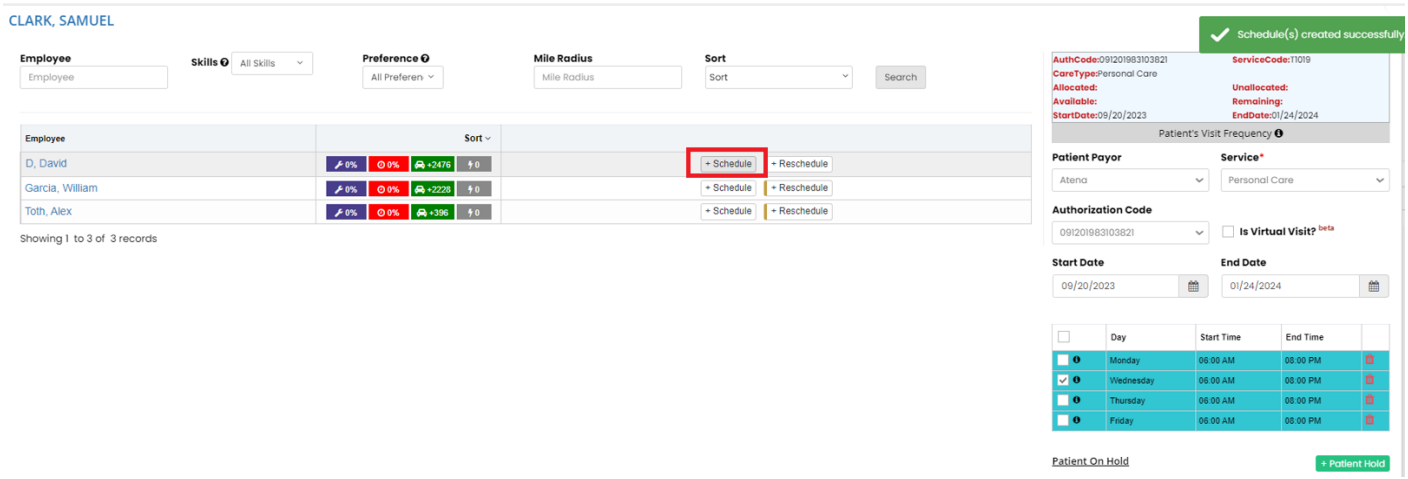


Now select the start date and end date of the schedule for which the employee has to be reassigned. Also click the check box to select the day for reassigning the employee and click unassign employee option on the right side of the day.

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

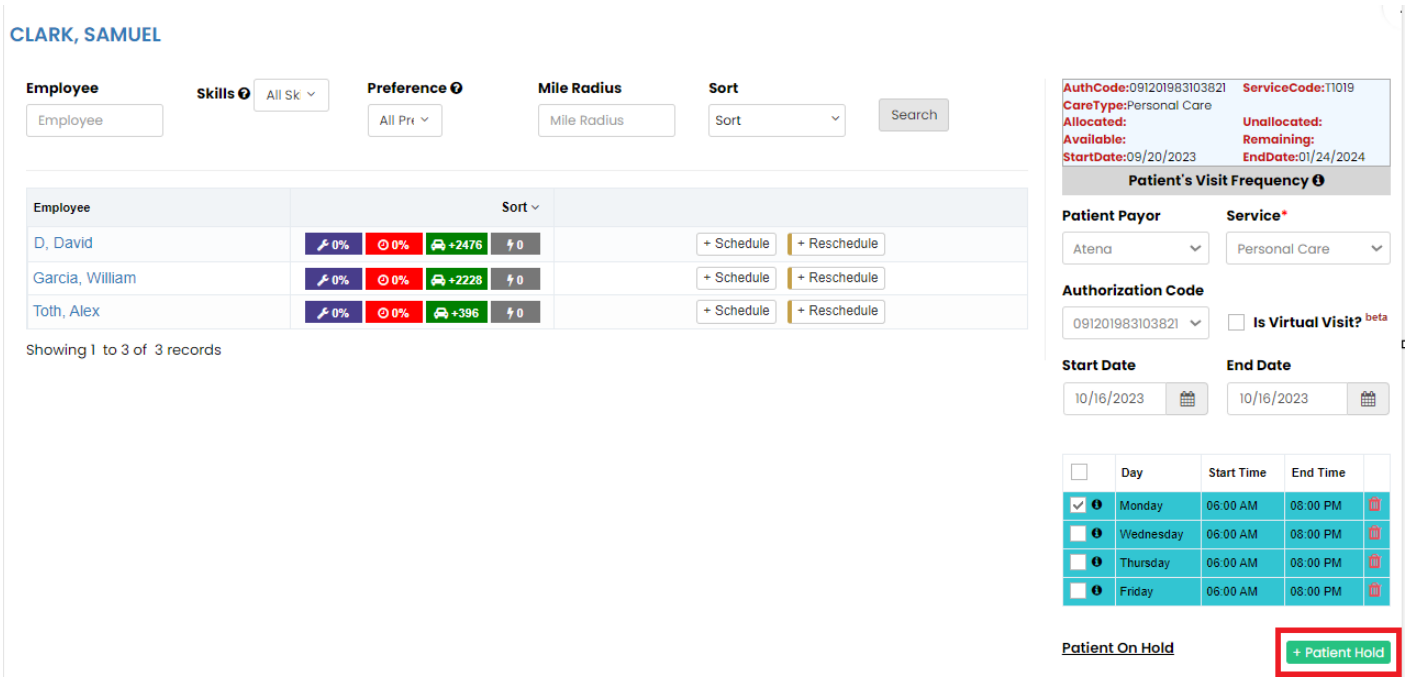


After the employee has been unassigned, click the check box for the day and click Schedule option on the right side of the employee who has to be scheduled for the patient.

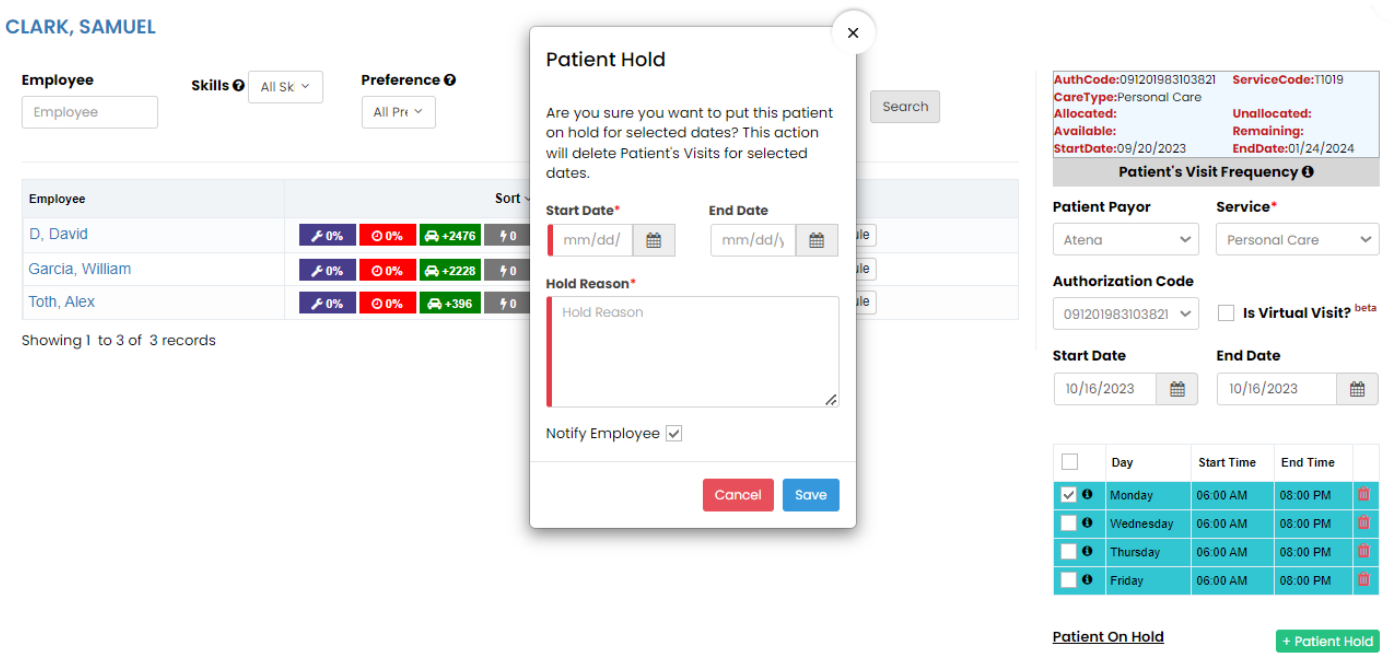


Patient on Hold

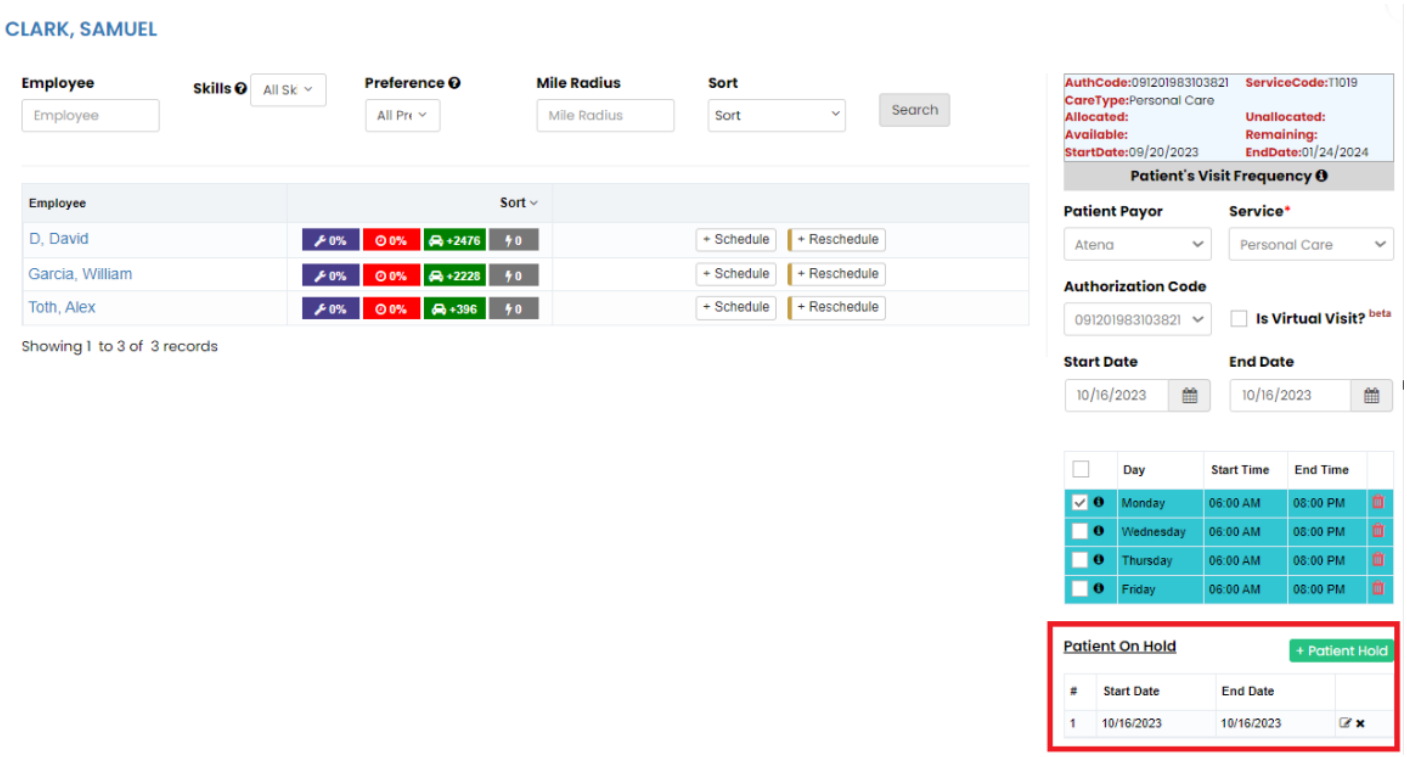
The user can keep the patient on hold for the day by using the option +Patient Hold.



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.



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



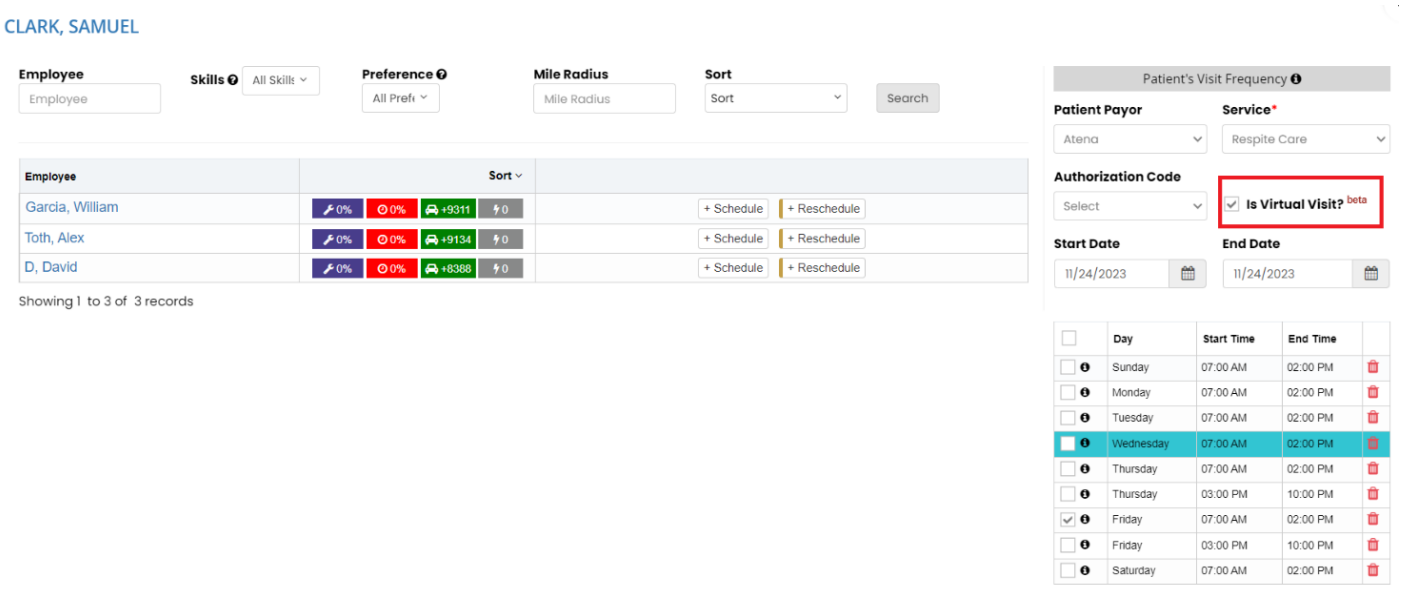
Virtual Visit

> **Client >> Schedule**

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

- Click the schedule now option.

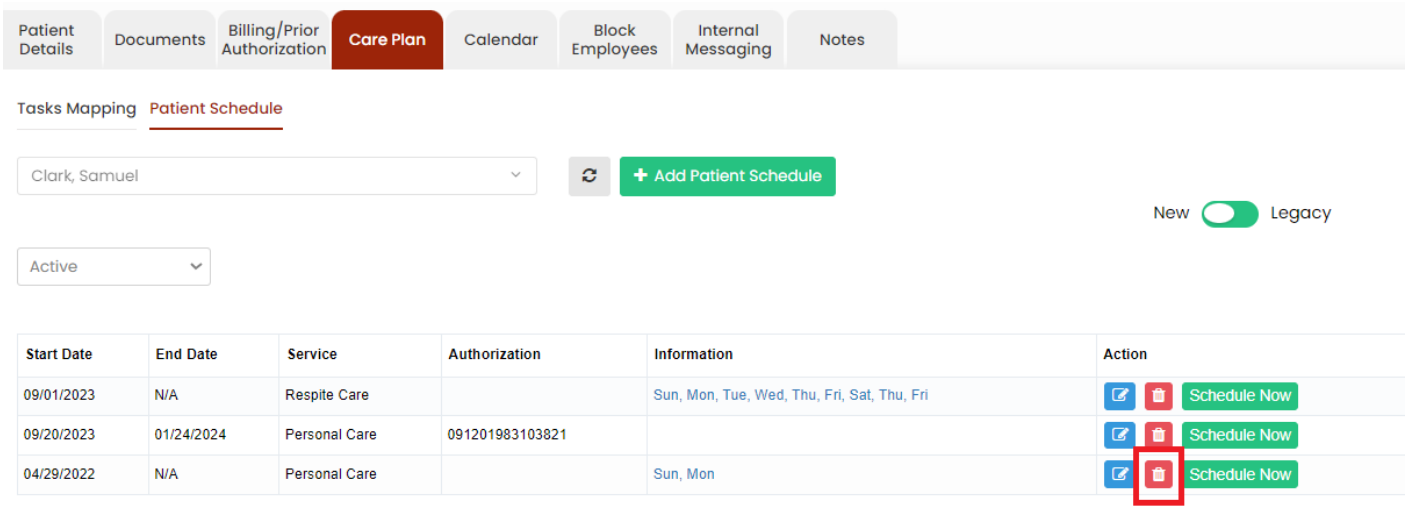
- Select the Patient Payor, Service and check the option Is Virtual Visit.
- Select the days of the schedule for Virtual Visit.
- Click Schedule option for the required employee in the list.



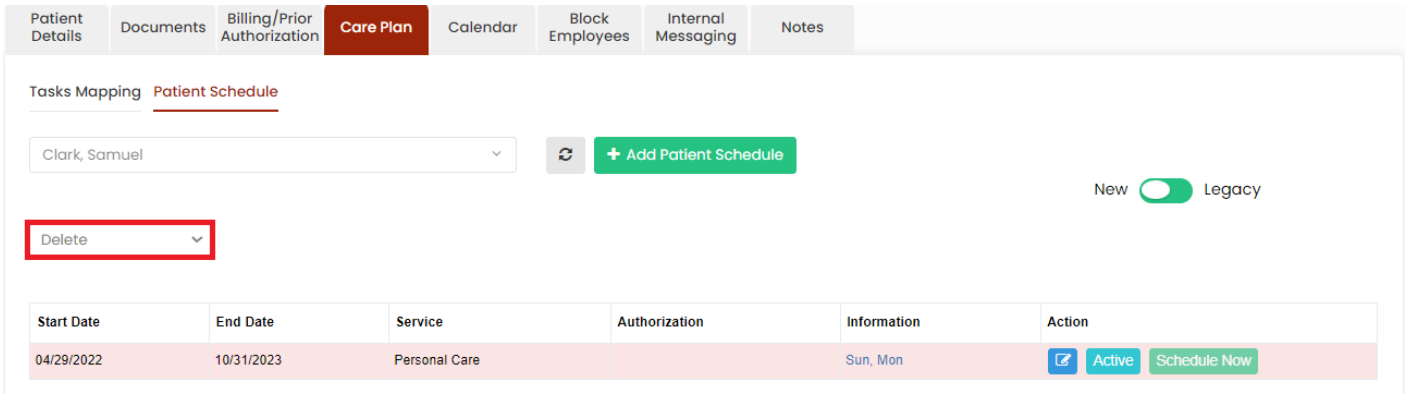
Delete Schedule

Client >> Schedule

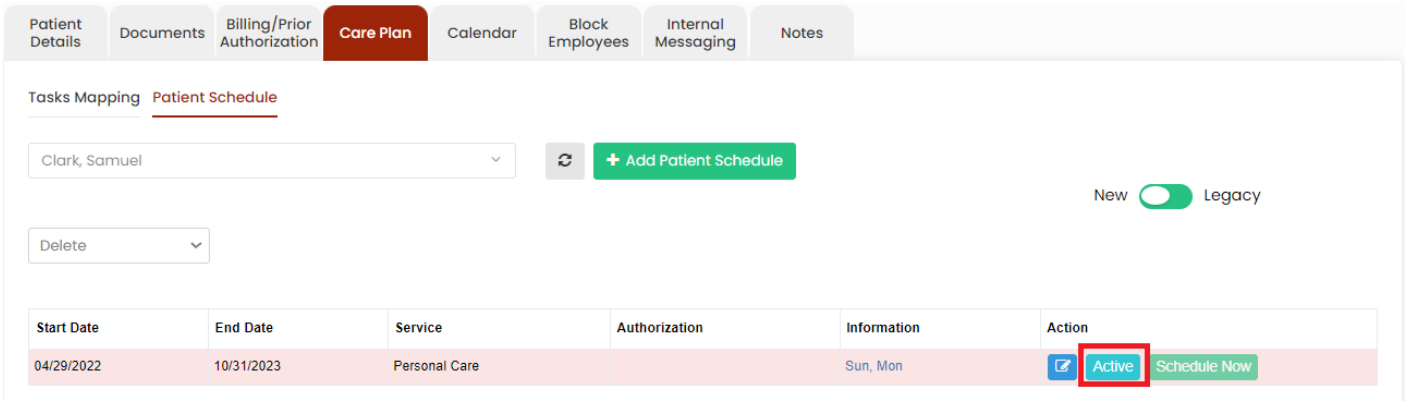
Click the Delete button before Schedule Now option to Delete the schedules created with wrong information.



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



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



Revision #18
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