

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

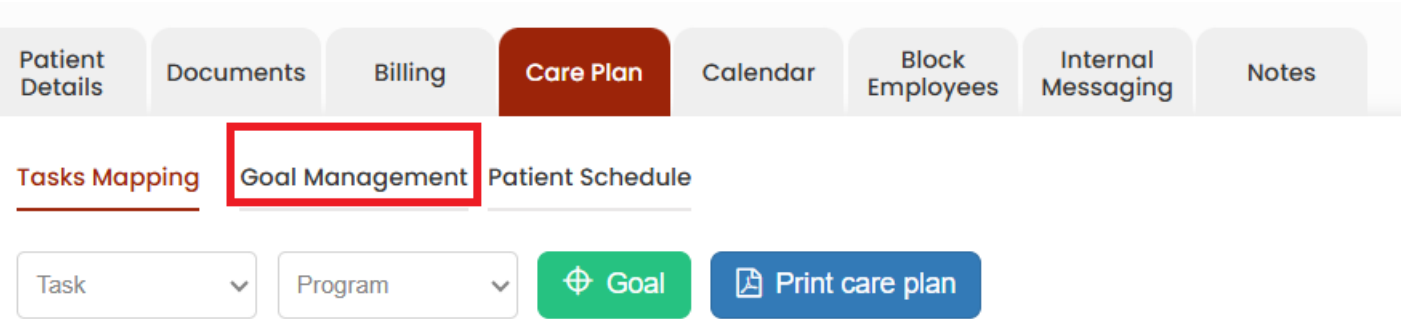
Print care plan

[illegible]

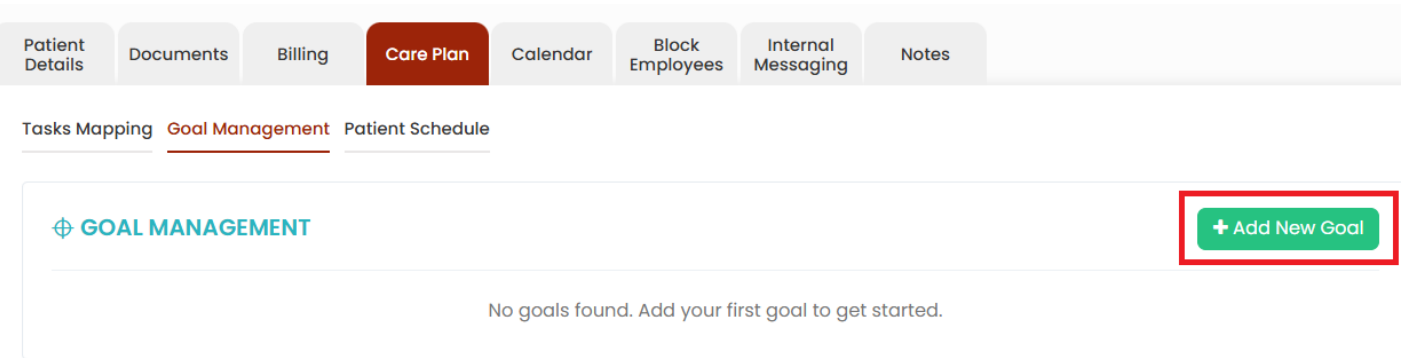
Goal Management

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.

☒ 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^{*}

Start Time^{*}

End Time^{*}

Select Day

Start 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, Brown

↺

+ Add Patient Schedule

NewLegacy

Active

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

Employee

Employee

SkillsAll Skills

PreferenceAll Preferences

Mile Radius

Mile Radius

Sort

Sort

Search

Employee	Sort	
Toth, Alex	<div><div>0%</div><div>0%</div><div>+1833</div><div>7</div></div>	<div>+ Schedule</div> <div>+ Reschedule</div>
Garcia, William	<div><div>0%</div><div>0%</div><div>+0</div><div>6</div></div>	<div>+ Schedule</div> <div>+ Reschedule</div>
D, David	<div><div>0%</div><div>0%</div><div>+922</div><div>0</div></div>	<div>+ Schedule</div> <div>+ 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 PayorAtena

ServicePersonal Care

Authorization Code254874587

Is Virtual Visit?beta

Start Date02/02/20

End 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	<input checked="" type="checkbox"/>

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

Employee

Skills

All Skills

Preference

All Prefr

Mile Radius

Mile Radius

Sort

Sort

Search

Employee	Sort	
Garcia, William	<div><div>0%</div><div>0%</div><div>+9311</div><div>0</div></div>	<div>+ Schedule</div> <div>+ Reschedule</div>
Toth, Alex	<div><div>0%</div><div>0%</div><div>+9134</div><div>0</div></div>	<div>+ Schedule</div> <div>+ Reschedule</div>
D, David	<div><div>0%</div><div>0%</div><div>+8388</div><div>0</div></div>	<div>+ Schedule</div> <div>+ Reschedule</div>

Showing 1 to 3 of 3 records

Patient's Visit Frequency

Patient Payor

Atena

Service

Respite Care

Authorization Code

Select

Start Date

11/24/2023

End Date

11/24/2023

Is Virtual Visit? beta

	Day	Start Time	End Time	
<input type="checkbox"/>	Sunday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Monday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Tuesday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Wednesday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Thursday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Thursday	03:00 PM	10:00 PM	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friday	07:00 AM	02:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Friday	03:00 PM	10:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Saturday	07:00 AM	02:00 PM	<input type="checkbox"/>

Delete Schedule

Client >> Schedule

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

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

Tasks MappingPatient Schedule

Clark, Samuel

+ Add Patient Schedule

NewLegacy

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

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

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

Tasks MappingPatient Schedule

Clark, Samuel

+

Add Patient Schedule

NewLegacy

Delete

Start Date	End Date	Service	Authorization	Information	Action
04/29/2022	10/31/2023	Personal Care		Sun, Mon	<div><div></div>ActiveSchedule Now</div>

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

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

Tasks MappingPatient Schedule

Clark, Samuel

+

Add Patient Schedule

NewLegacy

Delete

Start Date	End Date	Service	Authorization	Information	Action
04/29/2022	10/31/2023	Personal Care		Sun, Mon	<div><div></div>ActiveSchedule Now</div>