

# 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

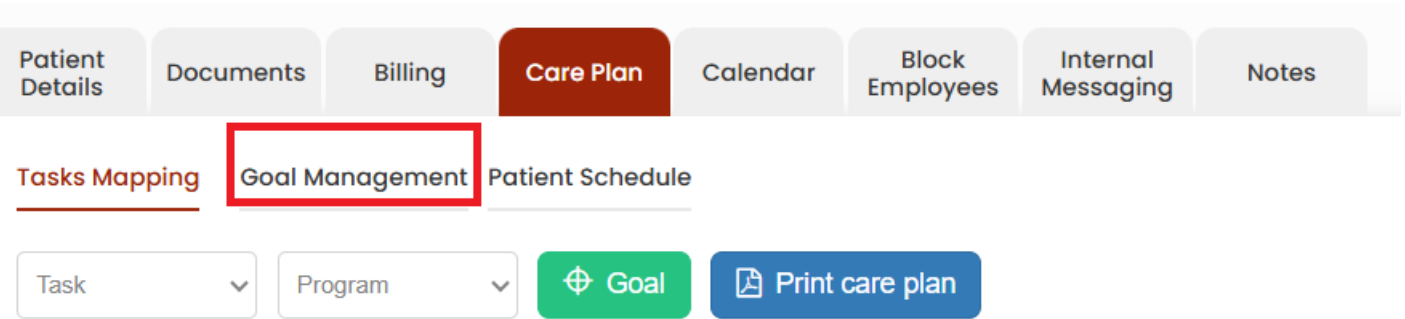
Print care plan

[illegible]

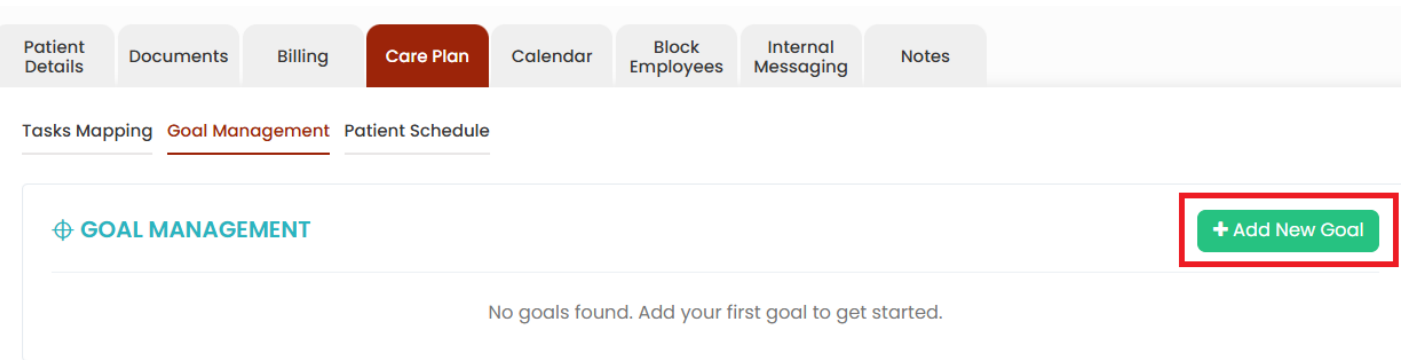
# Goal Management

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\*

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><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

EmployeeEmployee

SkillsAll Skills

PreferenceAll Preferences

Mile RadiusMile Radius

SortSort

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 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

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

Are you sure?

Cancel

Yes, Continue...

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
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

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?

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

	Day	Start Time	End Time	
<input type="checkbox"/>	Monday	06:00 AM	03:00 PM	
<input checked="" type="checkbox"/>	Wednesday	06:00 AM	03:00 PM	
<input type="checkbox"/>	Thursday	06:00 AM	03:00 PM	
<input type="checkbox"/>	Friday	06:00 AM	03:00 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
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?

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

	Day	Start Time	End Time	
<input checked="" type="checkbox"/>	Monday	06:00 AM	03:00 PM	
<input type="checkbox"/>	Wednesday	06:00 AM	03:00 PM	
<input type="checkbox"/>	Thursday	06:00 AM	03:00 PM	
<input type="checkbox"/>	Friday	06:00 AM	03:00 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

Search

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:11019

CareType:Personal Care

Allocated: Unallocated:

Available: Remaining:

StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Service\*

Atena Personal Care

Authorization Code

091201983103821 Is Virtual Visit? beta

Start Date End Date

10/16/2023 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

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 ServiceCode:11019

CareType:Personal Care

Allocated: Unallocated:

Available: Remaining:

StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Service\*

Atena Personal Care

Authorization Code

091201983103821 Is Virtual Visit? beta

Start Date End Date

10/16/2023 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  Preference  Mile Radius  Sort

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  ☒ Is Virtual Visit? beta

Start Date  End Date

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

## 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

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	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Schedule Now"/>
09/20/2023	01/24/2024	Personal Care	091201983103821		<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Schedule Now"/>
04/29/2022	N/A	Personal Care		Sun, Mon	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Schedule Now"/>

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>