

# Visit Report

A Visit Report is a digital record summarizing a caregiver's visit to a patient's home. It includes essential data such as date, time, tasks performed, patient information, payor information and billed amount for the Visit.

Scheduling >> Visit Report

The user can view the Visit Report of the patient in this screen. The filter options helps to get the data of the Visit report accurately.

TIME SHEET

Refresh

Active

Status

Service Type

Open Missing Timesheets

Census

Billed0

Not billed37

Paid0

Denied0

Invalid visits0

Select Bulk Type

EmployeeEmployee

PatientPatient

PayorPayor

ServiceService

AuthorizationSelect

Start Date10/06/2023

End Date10/26/2023

Search

Reset

<input type="checkbox"/>	Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clock In Mode	Clock Out Time	Total Time	Billing Amount	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/25/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/24/2023	Tuesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/12/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/11/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/09/2023	Monday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	<div><div></div>William Garcia</div>	Samuel Clark	<div>Atena</div> <div>Not Billed</div>	Personal Care	091201983103821	10/08/2023	Sunday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action

## Bulk Update Timesheet

The user can Bulk update the Care Type, Authorization code and Payor of the patient using the option Select Bulk Type.

TIME SHEET [Refresh](#) [Active](#) [Status](#) [Service Type](#) [Open Missing Timesheets](#) [Census](#)

Billed 0 Not billed 7 Paid 0 Denied 0

Invalid visits 0

Select Bulk Type   
 Select Bulk Type   
 Core Type   
 Authorization Code   
 Payor   
 Mark As Complete   
 Print Timesheets   
 Delete Selected   
 Approve Selected

Employee	Patient	Payor	Service	Authorization	Start Date	End Date	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action
Samuel Clark	Samuel Clark	Alena	Personal Care	091201983103621	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/25/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/24/2023	Tuesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
Intaza waris	Samuel Clark	Alena	Service Facilitation		10/26/2023	Thursday	+8388	03:40 am	Mobile	03:39 am			Action
Daniel Sohail	Samuel Clark	Alena	Personal Care		10/23/2023	Monday	+8210	02:20 pm	Mobile	02:20 pm			Action
Daniel Sohail	Samuel Clark	Alena	Personal Care		10/23/2023	Monday	+8210	02:19 pm	Mobile	N/A			Action
William Garcia	Samuel Clark	Alena	Respite Care		10/23/2023	Monday	+9311	01:44 pm	Mobile	N/A			Action

The Timesheet can also be filtered by the Status of the Visits like Pending, Approved, Rejected, Complete and Incomplete by using the option Status.

TIME SHEET [Refresh](#) [Active](#) [Status](#) [Service Type](#) [Open Missing Timesheets](#) [Census](#)

Billed 0 Not billed 46 Paid 0 Denied 0

Invalid visits 0

Select Bulk Type

Employee Employee Patient Patient Payor Payor Service Service Authorization Select Start Date MM/DD/YYYY End Date MM/DD/YYYY Search Reset

Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action
Intaza waris	Rahul T	United Healthcare	Personal Care		10/27/2023	Friday	+4690	03:41 am	Mobile	N/A			Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/25/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/24/2023	Tuesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action

# Open Missing Timesheet

## Scheduling >> Visit Report

The Missing Timesheet for the Visits can be added to the Timesheet by using the option Open Missing Timesheet option.

TIME SHEET [Refresh](#) [Active](#) [Status](#) [Service Type](#) [Open Missing Timesheets](#) [Census](#)

Billed 0 Not billed 38 Paid 0 Denied 0

Invalid visits 0

Select Bulk Type

Employee Employee Patient Patient Payor Payor Service Service Authorization Select Start Date MM/DD/YYYY End Date MM/DD/YYYY Search Reset

Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action
Intaza waris	Rahul T	United Healthcare	Personal Care		10/27/2023	Friday	+4690	03:41 am	Mobile	N/A			Action
William Garcia	Samuel Clark	Alena	Personal Care	091201983103621	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action

The following popup appears, update the Employee Name, Patient Name, Start Date, End Date and Click Search option. The list of missing Timesheet appears.

Missing TimeSheet

Employee List

irtaza waris

Patient List

Brown Hernandez

Start Date

10/10/2023

End Date

10/20/2023

Reset

Search

	Employee	Patient	Start Date	End Date	Service	Clock In Time	Clock Out Time
<input type="checkbox"/>	irtaza waris	Brown Hernandez	10/20/2023 5:57 am	10/20/2023 11:59 pm	Personal Care		
<input type="checkbox"/>	irtaza waris	Brown Hernandez	10/19/2023 4:08 am	10/19/2023 11:59 pm	Personal Care		
<input type="checkbox"/>	irtaza waris	Brown Hernandez	10/17/2023 5:34 am	10/17/2023 11:59 pm	Personal Care		
<input type="checkbox"/>	irtaza waris	Brown Hernandez	10/10/2023 8:00 am	10/10/2023 11:00 pm	Personal Care		

Now, check the check box of the Timesheet and click Add Missing Timesheet option.

Employee List

irtaza waris

Patient List

Brown Hernandez

Start Date

10/10/2023

End Date

10/20/2023

Reset

Search

Add missing Timesheet

	Employee	Patient	Start Date	End Date	Service	Clock In Time	Clock Out Time
<input checked="" type="checkbox"/>	irtaza waris	Brown Hernandez	10/20/2023 5:57 am	10/20/2023 11:59 pm	Personal Care		
<input checked="" type="checkbox"/>	irtaza waris	Brown Hernandez	10/19/2023 4:08 am	10/19/2023 11:59 pm	Personal Care		
<input checked="" type="checkbox"/>	irtaza waris	Brown Hernandez	10/17/2023 5:34 am	10/17/2023 11:59 pm	Personal Care		
<input checked="" type="checkbox"/>	irtaza waris	Brown Hernandez	10/10/2023 8:00 am	10/10/2023 11:00 pm	Personal Care		

The Timesheet gets added in the List of Timesheet and we can edit the Timesheet with the required information.

TIME SHEET

Refresh

Active

Status

Service Type

Open Missing Timesheets

Census

Billed0

Not billed42

Paid0

Denied0

Invalid visits0

Authorization Code

Employee Employee

Patient Patient

Payor Payor

Service Service

Authorization Select

Start Date09/28/202

End Date10/28/2023

Search

Reset

	Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action
<input type="checkbox"/>	! irtaza waris	Brown Hernandez	Not Billed	Personal Care	254874587	10/10/2023	Tuesday	+2330	N/A	Mobile	N/A			Action
<input type="checkbox"/>	! irtaza waris	Brown Hernandez	Atena Not Billed	Personal Care	254874587	10/17/2023	Tuesday	+2330	N/A	Mobile	N/A			Action
<input type="checkbox"/>	! irtaza waris	Brown Hernandez	Atena Not Billed	Personal Care	254874587	10/19/2023	Thursday	+2330	N/A	Mobile	N/A			Action
<input type="checkbox"/>	! irtaza waris	Brown Hernandez	Atena Not Billed	Personal Care	254874587	10/20/2023	Friday	+2330	N/A	Mobile	N/A			Action

# Edit Timesheet

Scheduling >> Visit Report

Click Action button on the right side of the Visit. The popup shows the actions that can be done in the Visit Report, click Edit Timesheet option to change the information in the Visit Report.

Billed0Not billed37Paid0Denied0

Invalid visits0

Select Bulk Type

Employee Patient Payor Service Authorization

Employee Patient Payor Service Select

Start Date10/06/2023End Date10/26/2023

SearchReset

<input type="checkbox"/>	Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Out Mode	Time	Rate	Hours	Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input checked="" type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/25/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/24/2023	Tuesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/12/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/11/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/09/2023	Monday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/08/2023	Sunday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6			Action

- Delete
- Print TimeSheet
- Edit TimeSheet
- Visit Task Documents

The following screen appears, click Edit option and update the required information.

Visit Time Sheet

Service Date:10/24/2023

Patient/Client ID #P-002

HHA/PCA NameNA/irtaza waris

Authorization Code254874587

Patient / Client NameBrown Hernandez

ServicePersonal Care

View Authorization Details

Beneficiary ID #P-002

Payor / InsuranceAtena

Edit

Schedule

Date10/24/2023

Start Time04:39 am

End Time11:59 pm

ClockIn Time :06:04 am

ClockOut Time :

Edit

Approval

ByPass Reason

Approve

Reject

Task

Conclusion

Deviation

Add Task

Task

Time

Action

ByPassReason Notes

Bypass Reason for Clock In:

Bypass Reason for Clock Out:

Edit

Complete

Click Add Task option and check the Visit Task Details from the list and click Save option.

## Visit Time Sheet

Service Date: 10/24/2023

Patient/Client ID # P-002  
HHA/PCA Name NA/irtaza waris  
Authorization Code 254874587

Beneficiary ID # P-002  
Payor / Insurance Atena

Edit

### Schedule

Date 10/24/2023

Start Time

ClockIn Time :  
06:04 am

ClockOut Time :  
11:00 pm

Edit

### ADD TASK

Simple ☒ Detail

id	VisitTaskDetail
<input type="checkbox"/>	Dressing
<input checked="" type="checkbox"/>	Laundry
<input checked="" type="checkbox"/>	Meal Preparation
<input checked="" type="checkbox"/>	Personal Hygiene
<input type="checkbox"/>	Supervision

Save

### Approval

ByPass Reason

Approve

Reject

Task Conclusion Deviation

Add Task

ByPassReason Notes

Task Time Action

Bypass Reason for Clock In:

Bypass Reason for Clock Out:

Edit

After updating the required details click the option Complete at the bottom of the Timesheet.

## Visit Time Sheet

Service Date:10/24/2023

<b>Patient/Client ID #</b>	P-002	<b>Patient / Client Name</b>	Brown Hernandez	<b>Beneficiary ID #</b>	P-002
<b>HHA/PCA Name</b>	NA/irtaza waris	<b>Service</b>	Personal Care	<b>Payor / Insurance</b>	Atena
<b>Authorization Code</b>	254874587	<a href="#">View Authorization Details</a>		<a href="#">Edit</a>	

Schedule

Date

10/24/2023

Start Time

04:39 am

End Time

11:59 pm

ClockIn Time :

06:04 am

ClockOut Time :

11:00 pm

Edit


### Approval







ByPass Approval Requ ▼

ByPass Reason

Approve

Reject



Task	Conclusion	Deviation	Add Task	
Task		Time	Action	
Meal Preparation		00:10 hrs		
Personal Hygiene		00:10 hrs		
Laundry		00:10 hrs		

ByPassReason Notes

Bypass Reason for Clock In:

Bypass Reason for Clock Out:

Edit

Complete

[Print TimeSheet](#)

After completing the Timesheet, Select the Timesheet using the check box and click Select Bulk Type dropdown. Now click Approve Selected option to Approve the Timesheet for Billing.

TIME SHEET

Refresh

Active

Status

Service Type

Open Missing Timesheets

Census

Billed0

Not billed2

Paid0

Denied0

Invalid visits0

Select Bulk Type

Select Bulk Type

Care Type

Patient

Payer

Mark As Complete

Print Timesheets

Delete Selected

Approve Selected

	Patient	Payer	Service	Authorization	Start Date	End Date										
	Patient Name	Payer	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action			
<input type="checkbox"/>	Brown Hernandez	Alena	Personal Care	254874587	10/26/2023	Thursday	+2330	02:13 am	Mobile	11:50 am			Action			
<input checked="" type="checkbox"/>	Itasca waris	Alena	Personal Care	254874587	10/24/2023	Tuesday	+2330	08:04 am	Mobile	11:00 pm	18:56:00	\$94.800	Action			

The following screen appears, click Approve option to Approve the Visits.

## Approve Visits

<input checked="" type="checkbox"/>	Employee Name	Patient Name	Service	Visit Date	Visit Day	Clock In Time <input type="checkbox"/> Schedule time	Clock Out Time <input type="checkbox"/> Schedule time	Note
<input checked="" type="checkbox"/>	Itaza walis	Brown Hernandez	Personal Care	10/24/2023	Tuesday	<input type="checkbox"/> Schedule time 08:04 am	<input type="checkbox"/> Schedule time 11:00 pm	Note (Optional)

Approve

# Delete Timesheet

## Scheduling >> Visit Report

Click Action button on the right side of the Visit. The popup shows the actions that can be done in the Visit Report, click Delete option.

TIME SHEET

Refresh

Active

Status

Service Type

Open Missing Timesheets

Census

Billed0

Not billed2

Paid0

Denied0

Invalid visits0

Select Bulk Type

Employee

Patient

Payor

Service

Authorization

Start Date

End Date

Search

Reset

Employee	Patient	Payor	Service	Authorization	Start Date	End Date														
Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time										
<input type="checkbox"/>	Itaza walis	Brown Hernandez	Alana	Not Billed	Personal Care	254874587	10/28/2023	Thursday	+2330	02:13 am	Mobile	11:50 am								
<input checked="" type="checkbox"/>	Itaza walis	Brown Hernandez	Alana	Not Billed	Personal Care	254874587	10/24/2023	Tuesday	+2330	08:04 am	Mobile	11:00 pm								

Delete

Print TimeSheet

Edit TimeSheet

Visit Task Documents

For deleting Bulk Timesheet, select the Timesheet using the checkbox and click Select Bulk Type. The list of option appears, click Delete Selection option.

TIME SHEET

Refresh

Active

Status

Service Type

Open Missing Timesheets

Census

Billed

0

Not billed

46

Paid

0

Denied

0

Invalid visits

0

Select Bulk Type

Select Bulk Type

Care Type

Authorization Code

Payor

Mark As Complete

Print Timesheets

Delete Selected

Approve Selected

Patient

Payor

Service

Authorization

Start Date

End Date

Search

Reset

	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	Clock Out Time	Total Time	Billing Amount	Action
	Rahul T	United Healthcare Not Billed	Personal Care		10/27/2023	Friday	+4990	03:41 am	Mobile	N/A			Action
<input checked="" type="checkbox"/>	William Garcia	Samuel Clark Alana Not Billed	Personal Care	091201983103821	10/26/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input checked="" type="checkbox"/>	William Garcia	Samuel Clark Alana Not Billed	Personal Care	091201983103821	10/25/2023	Wednesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input checked="" type="checkbox"/>	William Garcia	Samuel Clark Alana Not Billed	Personal Care	091201983103821	10/24/2023	Tuesday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action
<input type="checkbox"/>	William Garcia	Samuel Clark Alana Not Billed	Personal Care	091201983103821	10/12/2023	Thursday	+9311	07:00 am	Mobile	02:00 pm	07:00:00	145.6	Action

The deleted Timesheet can be viewed under the Deleted Timesheet list.

TIME SHEET
Refresh
Deleted
Status
Service Type
Open Missing Timesheets
Census

All Records  
Active  
Deleted

Billed 0
Not billed 1
Paid 0
Denied 0
Invalid visits 0
Delete Selected

Employee Employee
Patient Patient
Payor Payor
Service Service
Authorization Select
Start Date 09/28/202
End Date 10/28/2023
Search
Reset

	Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clock In Mode	Clock Out Time	Total Time	Billing Amount	Action
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care		10/08/2023	Sunday	+9311	07:00 am	Mobile	02:00 pm	07:00:00		Action

# Census Option

## Scheduling >> Visit Report

The number of Timesheet depending upon the status of the Timesheet can be viewed by using the option Census. Click Census option and select the option By Timesheet.

TIME SHEET
Refresh
Active
Status
Service Type
Open Missing Timesheets
Census

By Billing
By Timesheet

Billed 0
Not billed 42
Paid 0
Denied
Invalid visits 0

The number of Completed Timesheet, Incomplete Timesheet, Approval Approved Timesheet, Approval Pending Timesheet and Approval Rejected Timesheet can be viewed in the system.

TIME SHEET
Refresh
Active
Status
Service Type
Open Missing Timesheets
Census

Incomplete Time Sheet 27
Complete Time Sheet 15
Clock-In not done 0
Approval Pending 0
Approval Approved 8
Approval Rejected 0
Select Bulk Type

The number of Visits depending upon the status of the visit can be viewed by using the option By Billing under Census. The number of Billed visits, Paid visits, Not Billed visit, Denied visit and Invalid visits can easily viewed in the system.

TIME SHEET
Refresh
Active
Status
Service Type
Open Missing Timesheets
Census

By Billing
By Timesheet

Billed 0
Not billed 42
Paid 0
Denied
Invalid visits 0

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Revision #10

Created 27 October 2023 17:37:47 by Thamarai

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