



Visit Task


A Visit Task refers to a specific set of responsibilities and activities performed by a healthcare professional during a patient's home visit.


Note: All Fields marked with * are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.


Adding Visit Task


Settings >> Visit Task >> +Add option


 **SETTINGS** 


 AGENCY





 CASE MANAGER





 FACILITY HOUSE





 DOCUMENT MANAGEMENT


 DX CODE





 DROPDOWN EDITOR


 ORG PREFERENCE


 ORGANIZATION FORMS


 PAYOR





 PHYSICIAN





 PREFERENCE/SKILL





 SERVICE CODE



 VISIT TASK



 ADD

 LIST

The user can update the task details in the required fields and Click Save option.

If the task is a required task, select "YES" under Is Required field. We can also add forms to the task using the option + Add form under Form Mapping and map the the form to the updated task. The Mapped form will automatically appear in the mobile app for the when the Caregiver add the task in the mobile app and once the form is completed it will be automatically assigned with the Timesheet for the visits.

Task Detail

Task Type ? *	Task	+
Visit Type *	Select	
Service *	Select	
Task Code ?	Task Code	
Service Code ?	Enter the Service Code	
Category ?	Select Category	+
Sub Category ?	Select Sub Category	+
Task Detail ? *	Enter Task Detail	
Is Required? ?	No	
Minimum Time Required ?	Minimum Time Required	Minutes
Default Frequency ?	Select Frequency	
Is Default? ?	No	
Task Option ?	Select Task Option	
Default Task Option ?	No	

[Save](#) [Cancel](#)

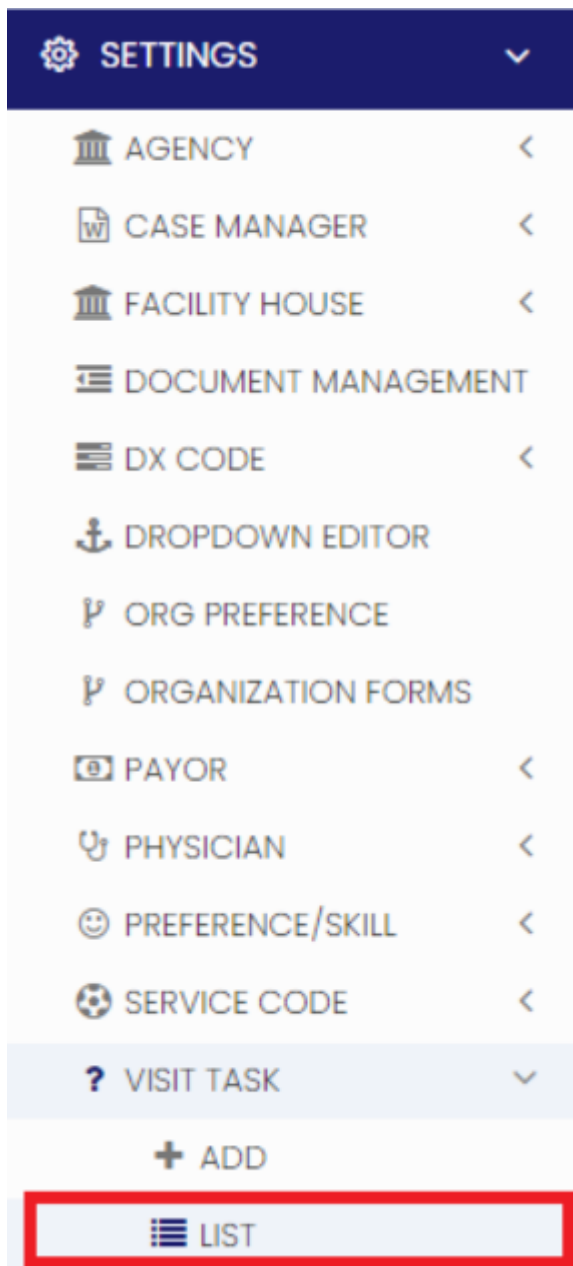
Form Mapping

[+ Add Form](#)

Note*: You can map form/s with this task. Please click on "Add Form" button to add form/s with this task.

Editing Visit Task

[Settings](#) >> [Visit Task](#) >> [List](#)



Select the task from the list using the checkbox and Click Edit option on the right side of the screen.

VISIT TASK LIST

Refresh

Active

Delete Selected

CloneTask

+ Visit Task

Select Bulk Type

Bulk Update

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	<input type="text" value="Task Detail"/>	<div>Select Category</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<input type="text" value="Service Code"/>				<div><div>Search</div><div>Reset</div></div>
<input type="checkbox"/>	Personal Hygiene	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<div><div></div><div></div></div>
<input checked="" type="checkbox"/>	Meal Preparation	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<div><div></div><div></div></div>
<input type="checkbox"/>	Dressing	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<div><div></div><div></div></div>

Now, Edit the required information and Click Update option.

Task Detail

Task Type ? *	Task	▼
Visit Type *	Non clinical	▼
Service *	Personal Care	▼
Task Code ?	Task Code	
Service Code ?	Enter the Service Code	
Category ?	Activities of Daily Living	▼ +
Sub Category ?	Select Sub Category	▼ +
Task Detail ? *	Meal Preparation	
Is Required? ?	No	▼
Minimum Time Required ?	Minimum Time Required	Minutes
Default Frequency ?	Select Frequency	▼
Is Default? ?	Yes	▼
Task Option ?	Select Task Option	▼
Default Task Option ?	No	▼

Update

Cancel

Delete Visit Task

[Settings >> Visit Task >> List](#)

Select the Visit Task from list using the check box and click Delete or Disable Selected option in the screen.

VISIT TASK LIST

[Refresh](#) [Active ▼](#) [Delete Selected](#) [CloneTask](#) [+ Visit Task](#) [Select Bulk Type ▼](#) [Bulk Update](#)

Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category ▼	Select ▼	Select ▼	Select ▼	Service Code				Search Reset
<input checked="" type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Edit Delete
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Edit Delete
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			Edit Delete
<input type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			Edit Delete
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			Edit Delete

Now, the Visit Task gets deleted and we can view the Visit Task under Deleted list.

VISIT TASK LIST

Refresh

Deleted

CloneTask

+ Visit Task

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Select	Service Code				SearchReset
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> Active

The user can also Restore the deleted Visit Task by using the option Active on the right side of the screen.

VISIT TASK LIST

Refresh

Deleted

CloneTask

+ Visit Task

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Select	Service Code				SearchReset
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input checked="" type="checkbox"/> Active

Clone Task

Settings >> Visit Task >> List

The user can create the same Visit Task details for different service code by using the option Clone Task.

Select the Visit Task and click Clone Task on the screen.

VISIT TASK LIST

Refresh

Active

Delete Selected

CloneTask

+ Visit Task

Select Bulk Type

Bulk Update

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	Task Detail	Select Category	Select	Select	Select	Service Code				SearchReset
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<input type="checkbox"/> <input type="checkbox"/>

Now, the clone task screen appears. Select the Target service from the List and click Clone option.

Clone task

Target Service

Respite Care

Target Service Code

Select

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required
<input checked="" type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes		

Clone

Close

Now the new Visit task is created with Service name Respite Care in the List.

VISIT TASK LIST									
<div><div>Refresh</div><div>Active</div><div>CloneTask</div><div>+ Visit Task</div></div>									
Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			

Bulk Update

Settings >> Visit Task >> List

The user can Bulk update the Task details like Visit Type, Task Type, Care Type and Service Code by using the option Bulk Update.

Select the Visit Task by using the check box and click Select Bulk Type option.

VISIT TASK LIST									
<div><div>Refresh</div><div>Active</div><div>Delete Selected</div><div>CloneTask</div><div>+ Visit Task</div><div>Select Bulk Type</div><div>Bulk Update</div></div>									
Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input checked="" type="checkbox"/> Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			





Now, select the Category from the list and the related options and then click Bulk Update option.

VISIT TASK LIST									
<div><div>Refresh</div><div>Active</div><div>Delete Selected</div><div>CloneTask</div><div>+ Visit Task</div><div>Care Type</div><div>Select</div><div>Bulk Update</div></div>									
Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/> Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
<input checked="" type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			
<input type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			

The required Category has been added in the list.

VISIT TASK LIST

 Refresh Active  CloneTask  Visit Task

	Task Detail	Category	Task Type	Visit Type	Service	Service Code	Is Default?	Is Required?	Minimum Time Required	Action
<input type="checkbox"/>	<input type="text" value="Task Detail"/>	<div>Select Category </div>	<div>Select </div>	<div>Select </div>	<div>Select </div>	<input type="text" value="Service Code"/>				<div>Search  Reset </div>
<input type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	RN supervisory	N/A	Yes			<div> </div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			<div> </div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div> </div>
<input type="checkbox"/>	Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div> </div>
<input type="checkbox"/>	Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div> </div>
<input type="checkbox"/>	Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div> </div>
<input type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div> </div>

Revision #13
Created 20 October 2023 21:56:43 by Thamarai
Updated 12 April 2024 21:57:48 by Thamarai