

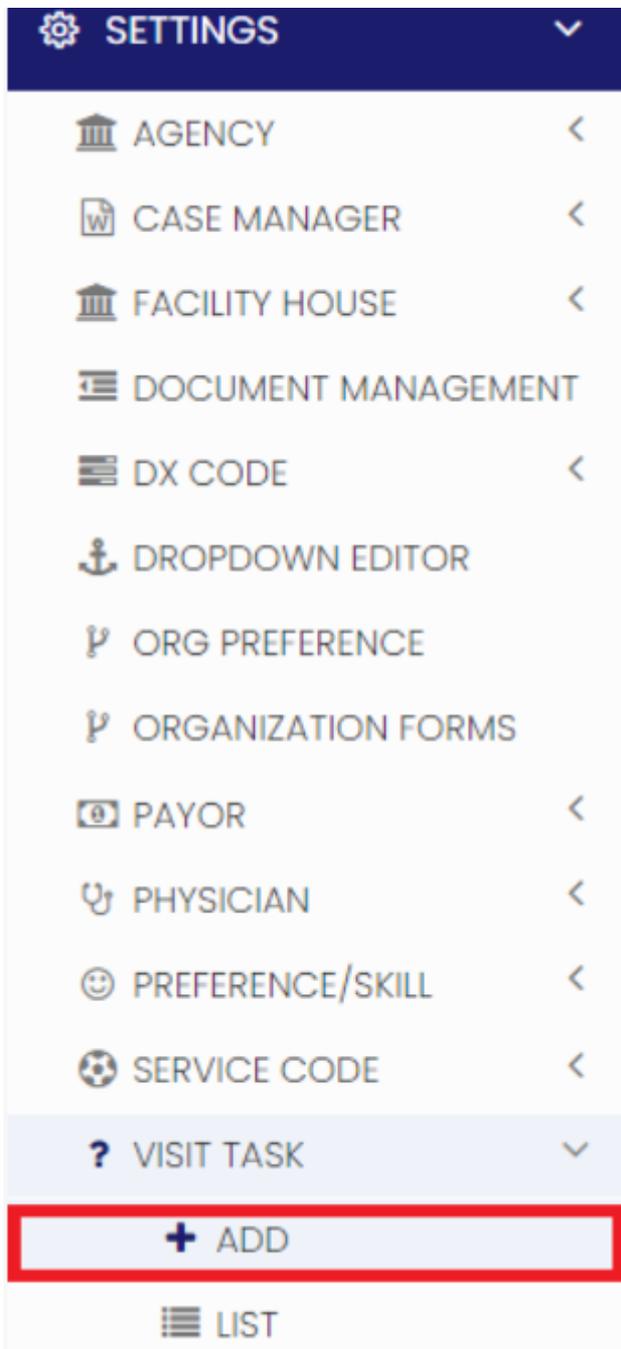
# Visit Task

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**



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**

<b>Task Type</b> ⓘ *	<input type="text" value="Task"/>	
<b>Visit Type</b> *	<input type="text" value="Select"/>	
<b>Service</b> *	<input type="text" value="Select"/>	
<b>Task Code</b> ⓘ	<input type="text" value="Task Code"/>	
<b>Service Code</b> ⓘ	<input type="text" value="Enter the Service Code"/>	
<b>Category</b> ⓘ	<input type="text" value="Select Category"/>	+
<b>Sub Category</b> ⓘ	<input type="text" value="Select Sub Category"/>	+
<b>Task Detail</b> ⓘ *	<input type="text" value="Enter Task Detail"/>	
<b>Is Required?</b> ⓘ	<input type="text" value="No"/>	
<b>Minimum Time Required</b> ⓘ	<input type="text" value="Minimum Time Required"/> <input type="text" value="Minutes"/>	
<b>Default Frequency</b> ⓘ	<input type="text" value="Select Frequency"/>	
<b>Is Default?</b> ⓘ	<input type="text" value="No"/>	
<b>Task Option</b> ⓘ	<input type="text" value="Select Task Option"/>	
<b>Default Task Option</b> ⓘ	<input type="text" value="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**

**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**

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"/> Task Detail	Select Category 	Select 	Select 	Select 	Service Code				Search  Reset 
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			 
<input checked="" type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			 
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			 

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				<a href="#">Search</a> <a href="#">Reset</a>
<input checked="" type="checkbox"/> Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/> Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/> Personal Hygiene	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/> Meal Preparation	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/> Dressing	Activities of Daily Living	Task	Clinical	Personal Care	N/A	Yes			<a href="#">Edit</a> <a href="#">Delete</a>

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
Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			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
Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			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
Task Detail	Select Category	Select	Select	Select	Service Code				Search Reset
Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			Clone Delete
Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Clone Delete
Laundry	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Clone Delete
Personal Hygiene	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Clone Delete
Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Clone Delete
<input checked="" type="checkbox"/> Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			Clone Delete

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.

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.

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.

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

	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	RN supervisory	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			

Revision #13

Created 20 October 2023 21:56:43 by Thamarai

Updated 12 April 2024 21:57:48 by Thamarai