

# 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

Employee

Patient

Payor

Service

Authorization

Start Date

End Date

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 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
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
Intaza wais	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

Status

Pending

Approved

Rejected

Incomplete

Complete

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 wais	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 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 wais	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.

Billed0

Not billed37

Paid0

Denied0

Invalid visits0

Select Bulk Type

Employee

Patient

Payor

Service

Authorization

Start Date

End Date

Search

Reset

<input type="checkbox"/>	Employee Name	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	Clockin Mode	C	T	Action	
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/26/2023	Thursday	+9311	07:00 am	Mobile	0		Action	
<input checked="" type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/25/2023	Wednesday	+9311	07:00 am	Mobile	0		Action	
<input type="checkbox"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care	091201983103821	10/24/2023	Tuesday	+9311	07:00 am	Mobile	0		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

Patient / Client NameBrown Hernandez

Beneficiary ID #P-002

HHA/PCA NameNA/irtaza waris

ServicePersonal Care

Payor / InsuranceAtena

Authorization Code254874587

View Authorization Details

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

ByPassReason Notes

Task

Time

Action

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.

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

**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

APPROVED

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

Billed: 0      Not billed: 2      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

Client	Patient Name	Payor	Service	Authorization Code	Visit Date	Visit Day	Miles	Clock In Time	ClockIn Mode	Clock Out Time	Total Time	Billing Amount	Action
Brown Hernandez	Brown Hernandez	Atena	Personal Care	254874587	10/26/2023	Thursday	+2330	02:13 am	Mobile	11:50 am			Action
irtaza waris	Brown Hernandez	Atena	Personal Care	254874587	10/24/2023	Tuesday	+2330	06:04 am	Mobile	11:00 pm	16:56:00	504.506	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 wais	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

Employee

Patient

Brown Hernandez

Payor

Payor

Service

Service

Authorization

Select

Start Date

10/24/2023

End Date

10/28/2023

Search

Reset

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

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

Billed0

Not billed46

Paid0

Denied0

Invalid visits0

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](#)

<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"/>	William Garcia	Samuel Clark	Atena Not Billed	Personal Care		10/08/2023	Sunday	+9311	07:00 am	Mobile	02:00 pm	07:00:00		<a href="#">Action</a>

# 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 0

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 0

Invalid visits 0



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