



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. The required fields are used for billing and the other fields are optional.

Task Detail

| | | | |
|-----------------------|---------------------|---|---|
| Task Type ? * | Select Task Type | ▼ | |
| Service | Select | ▼ | |
| Task Code ? | Task Code | | |
| Category ? | Select Category | ▼ | + |
| Sub Category ? | Select Sub Category | ▼ | + |
| Task Detail ? * | Enter Task Detail | | |
| Is Required? ? | No | ▼ | |
| Default Frequency ? | Select Frequency | ▼ | |
| Is Default? ? | No | ▼ | |
| Task Option ? | Select Task Option | ▼ | |
| Default Task Option ? | No | ▼ | |

Save

Cancel

Task Type

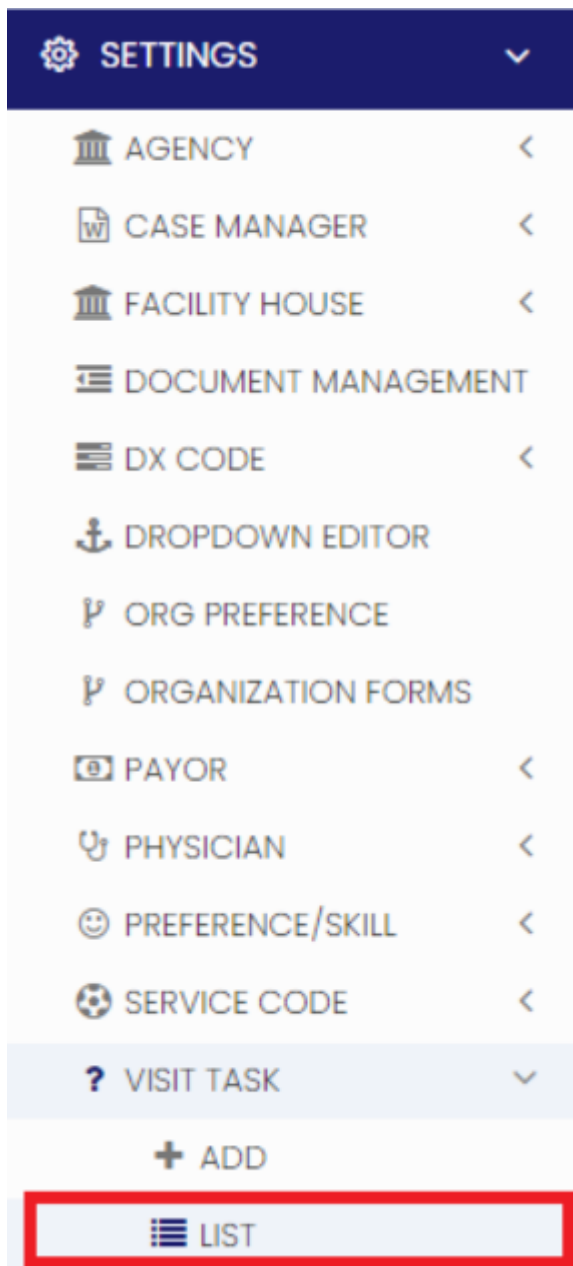
- Task
- Conclusion

Task - The option Task in Task Type refers to the Task activity performed by the employee at the time of visit.

Conclusion - This task appears on Visit Survey in EVV app as a conclusion. The Task Type Conclusion will have the options Yes or No and to update the comments regarding the 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 ? * | <div>Task</div> |
| Visit Type * | <div>Non clinical</div> |
| Service * | <div>Personal Care</div> |
| Task Code ? | <div>Task Code</div> |
| Service Code ? | <div>Enter the Service Code</div> |
| Category ? | <div>Activities of Daily Living</div> |
| Sub Category ? | <div>Select Sub Category</div> |
| Task Detail ? * | <div>Meal Preparation</div> |
| Is Required? ? | <div>No</div> |
| Minimum Time Required ? | <div>Minimum Time Required</div> <div>Minutes</div> |
| Default Frequency ? | <div>Select Frequency</div> |
| Is Default? ? | <div>Yes</div> |
| Task Option ? | <div>Select Task Option</div> |
| Default Task Option ? | <div>No</div> |

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

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 | | | | Search Reset |
| <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 | | | | Search Reset |
| <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 | | | | Search Reset |
| <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 | | | | | | | | | |
|---|----------------------------|-----------|--------------|---------------|--------------|-------------|--------------|-----------------------|--------------|
| 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"/> 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.

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"/> | 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 | | | |

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</div> <div>Reset</div> |
| <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 #5

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