



# 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

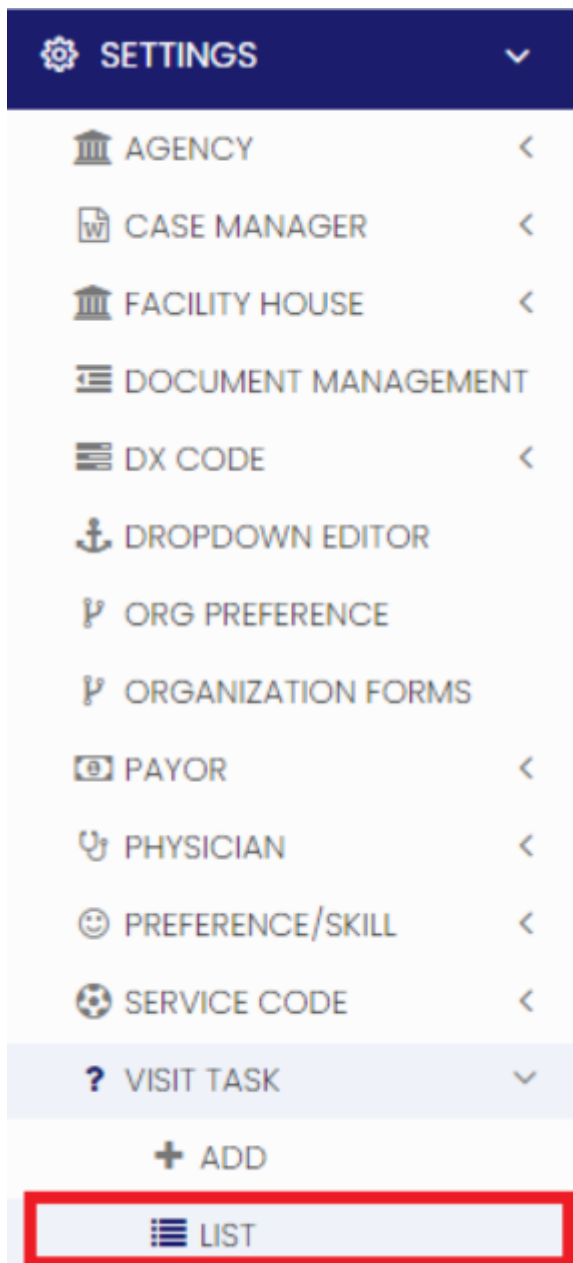
- Task
- Conclusion

**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.

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

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				<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div>Active</div>

# 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				<div>Search</div> <div>Reset</div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			<div></div> <div></div>
<input 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	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>
<input type="checkbox"/>	Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>
<input checked="" type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>

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			<div></div> <div></div>
<input type="checkbox"/>	Supervision	Activities of Daily Living	Task	Non clinical	Respite Care	N/A	Yes			<div></div> <div></div>
<input 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	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>
<input type="checkbox"/>	Meal Preparation	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>
<input type="checkbox"/>	Dressing	Activities of Daily Living	Task	Non clinical	Personal Care	N/A	Yes			<div></div> <div></div>

Revision #5

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