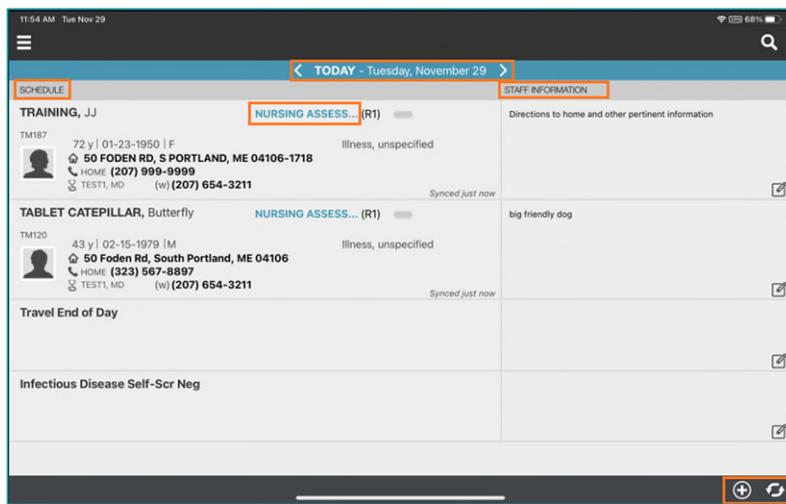


Recurring and non-recurring visits and activities are created for a patient visit or activity as needed. Today, Calendar, and Time Entry are screens that aid in adding, viewing, and monitoring recurring and non-recurring visit entries.

Today

The today screen is the default screen when logging in. This screen displays the visits scheduled for the date selected as well as any activities that have been entered. The today screen also updates to provide the visual indicators that visits have been submitted and the activities have synced.



➤ Date

- Tapping the date opens the calendar view.
- Tapping the arrows to the left or right change the date forward or backwards up to 7 days.

➤ Schedule

- **Patient Visits**
 - Tapping the **Visit Type** in blue opens the patient's chart. Opening a patient visit from the today screen ensures all documentation is attached to the correct visit.
 - Documentation progress for a visit displays in the pill indicator.
 - When all documentation is complete, the visit displays the clipboard and green checkmark to indicate the visit has been submitted.
 - Tapping **Patient Address** displays Google Map directions to that address.
 - Tapping **Patient's Home** displays their contacts and phone numbers.
 - Tapping **MD Phone** displays the Care Team and the Physician information.



- **Activities**

- Staff activities, such as office time, staff meetings, and travel end of day displays.
- These display in black when they are incomplete, when complete they change to gray.

➤ **Staff Information**

- Information entered here is for anyone visiting the patient.
- This space allows staff to enter information related to the patient's home situation such as pets in home or patient is hard of hearing.
 - This can be edited on the **Today** screen or the **Basics** screen.
- It is recommended to add information related to poor connection here for all care team members.
 - Edit the staff information by selecting the pencil and paper icon.

➤ **Synchronization and Add**

- The sync icon appears in the bottom right-hand corner of the screen, allowing to manually **synchronize**.
- The timeframe of the last sync displays on the today screen associated to each patient.
- After synchronization occurs, select  to add a patient visit or activity from the calendar.

Calendar

Calendar provides a week or day view of a staff's schedule. Recurring and non-recurring visits and activities are added from here.

➤ **Adding a Visit**

STEP 1: Select **+Add** and tap **Visit** or **Activity**.

- For a **non-recurring visit**, select the **visit type**.
- For **recurring visits**, the **number of visits** and **frequency** (days, weeks) also need to be completed.
- For an **activity**, complete **Resource Type**, **Date**, and **Activity**.
 - Do not enter a Start Time or Duration for an activity.
 - Use Clear if those fields populate. This keeps the activity on the tablet.

STEP 2: Select **Done** to add visit to the schedule.

- Select **Done & Navigate** to add and go directly to the patient's appointment and immediately begin the visit.
-

➤ **Removing a visit or activity**

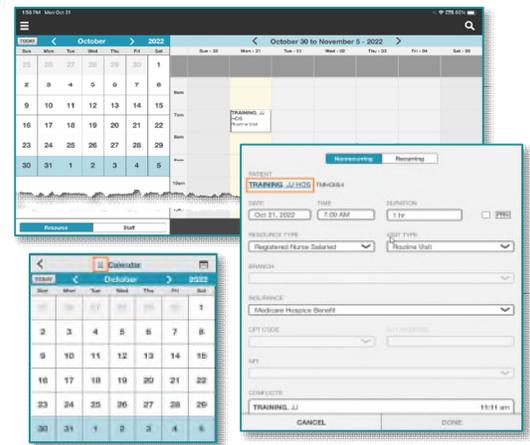
STEP 1: From the Calendar **Day view**, navigate to the necessary appointment.

STEP 2: Select the **trash can** icon and tap **delete** to confirm deleting the visit or activity.

- If the visit has already been started, you are not able to complete these steps.

➤ **Toggling Calendars**

- From **Calendar**, select the applicable patient.
- Within the visit information window, select the patient's name, this should look like a hyperlink.
 - This takes you to the patient's calendar, this is indicated by the patient's demographics bar displaying.
- Select the **Stethoscope** to return to your calendar and toggle to another patient's calendar.

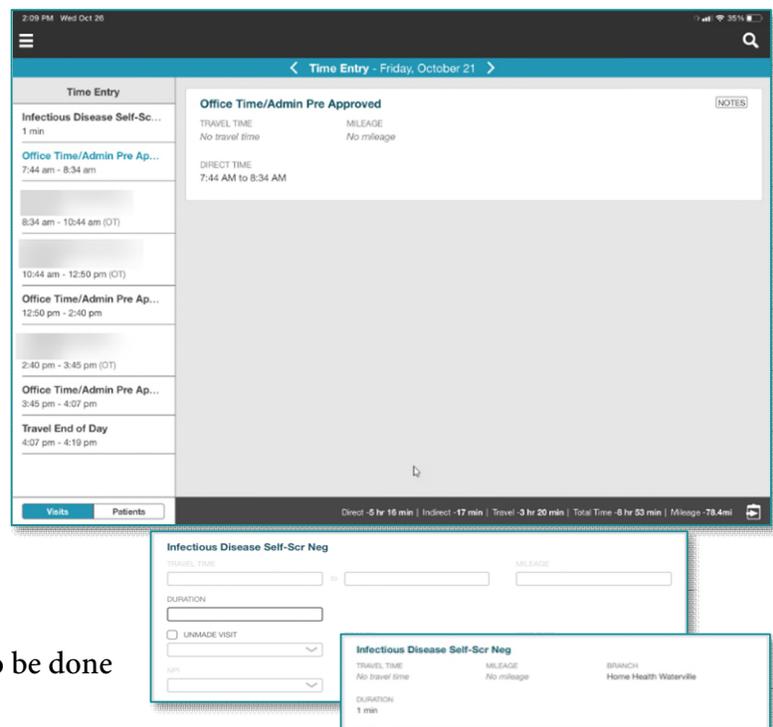


Time Entry

Time entry is the screen where the time associated to a visit or an activity is submitted. Adding a patient visit or activity can be initiated from here.

➤ **Overview**

- Displays lists of patient names that have incomplete and/or unsubmitted visits.
 - Schedule notes that are entered on a visit or activity, are viewable on Time Entry by tapping **NOTES**.
- When the fields are editable, this indicates that the visit has not been submitted.
 - Submit the visit when all documentation is complete.
- If the fields are not editable, the visit or activity has been submitted.
 - If updates need to occur, this needs to be done on the **Host** environment.
- View by **Visits** or **Patients**.



- To display more information for a specific line, tap that line. The information displays on the right-hand side.
- **Total Direct time, Indirect time, Travel time, Total time and Mileage** populate at the bottom based on the information entered on Time Entry.

➤ **Submitting a visit**

STEP 1: When documentation is complete, tap the  in the bottom right-hand corner.

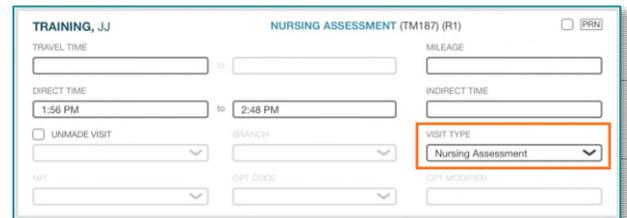
- The list of patients displays to indicate the visit and/or documentation will be submitted.
- Uncheck any patient whose visits and/or documentation you wish to not submit.

STEP 2: Enter your password, this is your electronic signature signing off on the information being submitted.

- Time Entry shows the total time of the visit (including travel, direct and in direct time), total mileage and total visits for that day.

➤ **Updating the Visit Type**

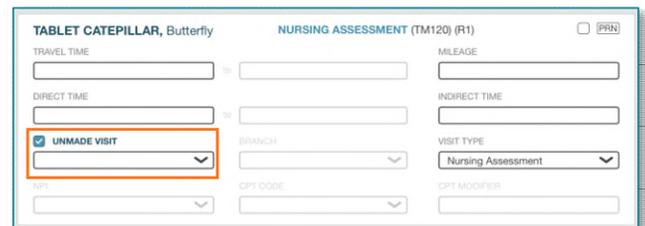
- If a visit has already been started and the visit type needs to be updated, navigate to the time entry screen and locate the patient visit.
- Update the **Visit Type** using the drop-down.



The screenshot shows a form for 'TRAINING, JJ' with the title 'NURSING ASSESSMENT (TM187) (R1)'. It includes fields for TRAVEL TIME, DIRECT TIME (1:58 PM to 2:48 PM), MILEAGE, and INDIRECT TIME. There are checkboxes for 'UNMADE VISIT' and 'PRN'. A dropdown menu for 'VISIT TYPE' is highlighted with a red box and currently shows 'Nursing Assessment'. Other dropdowns include 'BRANCH', 'CPT CODE', and 'CPT MODIFIER'.

➤ **Making a Visit Unmade**

- To mark a visit unmade, navigate to the visit on time entry.
- Check **Unmade Visit** and select the drop-down arrow to choose the **reason**.
 - If any direct time and/or travel time populates, remove as necessary.



The screenshot shows a form for 'TABLET CATEPILLAR, Butterfly' with the title 'NURSING ASSESSMENT (TM120) (R1)'. It includes fields for TRAVEL TIME, DIRECT TIME, MILEAGE, and INDIRECT TIME. The 'UNMADE VISIT' checkbox is checked and highlighted with a red box. The 'VISIT TYPE' dropdown menu is also highlighted with a red box and shows 'Nursing Assessment'. Other dropdowns include 'BRANCH', 'CPT CODE', and 'CPT MODIFIER'.