Creating a Patient Task sends a notification or a request for additional work.

Creating a Patient Task

STEP 1: Select **Patient Task** tile in patient chart.

STEP 2: Select **+** in lower right corner.

STEP 3: Complete fields in task window:

- **Task Code:** based on the type of task
- **Assigned To:** based on the type of task
- **Due Date:** leave blank
- **Status:** leave as Not Started
- **Priority:** Defaults to Normal, update as necessary
- **Comment:** Reason for task

Common Tasks

➢ **Notification of changing the Start and/or End time of a visit by more than ten minutes.**

- **Task Code:** EVV/MCG+ Corrections (Clinical)
- **Assigned to:** 327635 EVV/MCG+, Corrections
- **Comment:** Why the time was changed?

➢ **Request Insurance Authorization for more visits**

- **Task Code:** Auth for more visits – add Discipline & # of visits requested (Clinical)
- **Assigned to:** 169764 Authorization, Insurance
- **Comment:** Add the Discipline and how many additional visits are being requested

➢ **LiveSafe**

- **Task Code:** FYI (for your information/Clinician Reminder)
- **Assigned to:**
  - 276471 LiveSAFE Bangor
  - 276472 LiveSAFE Ellsworth
  - 276473 LiveSAFE Presque Isle
  - 276475 LiveSAFE South Portland
  - 276476 LiveSAFE Waterville
- **Comment:** Identify contact person, along with information about need for equipment.

➢ **Telehealth**

- **Task Code:** HHA for Telehealth setup

- **Assigned to:**
  - 342281 - Telehealth, Aroostook
  - 342275 - Telehealth, Bangor
  - 342282 - Telehealth, Ellsworth
  - 342283 - Telehealth, South Portland
  - 342280 - Telehealth, Waterville

- **Comment**
  - Diagnosis
  - If patient needs a small or bariatric unit

➢ **Scheduling HHA (Aide) visits**

- **Task Code:** Need to schedule assigned discipline.

- **Assigned to**:
  - 185721 - Scheduling, Bangor
  - 306405 - Scheduling, Coastal
  - 185719 - Scheduling, Ellsworth
  - 306406 - Scheduling, Portland
  - 185720 - Scheduling, Presque Isle
  - 306404 - Scheduling, Sebago Lake
  - 169765 - Scheduling, South Portland
  - 271882 - Scheduling, Waterville

- **Comment:** HHA Visit Frequency, first week visits are assigned to **Unassigned, Aide** resource.