
Creating a Patient Task sends a notification within the chart or a request for additional services.

Creating a Patient Task

- STEP 1:** Select **Patient Task** tile.
- STEP 2:** Select + in lower right corner.
- STEP 3:** Complete fields in task window:
- **Task Code**
 - **Assigned To**
 - **Due Date:** Today
 - **Status:** 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
 - **Assigned to:** 327635 EVV/MCG+, Corrections
 - **Due date:** Today's date
 - **Comment:** Why the time had to be changed?
 - Add Insurance Authorization for more visits
 - **Task Code:** Auth for more visits – add discipline and number of visits requested.
 - **Assigned to:** 169764 Authorization, Insurance
 - **Due date:** Today's date
 - **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
-

From the Office of Clinical Informatics

Netsmart – Patient Tasks

June 12, 2024

Page 2 of 2

- 276475 LiveSAFE South Portland
- 276476 LiveSAFE Waterville

- **Due date:** Today's date
- **Comment:** Identify contact person, along with information about need for equipment.

➤ Telehealth

- **Task Code:** HHA for Telehealth setup
- **Assigned to:**
 - 251849 TELEHEALTH, North (Bangor, Ellsworth, Aroostook)
 - 251847 TELEHEALTH, South (South Portland, Waterville)
- **Due date:** Today's date
- **Comment**
- **Information for Telehealth staff:**
 - Diagnosis
 - If patient needs a small or bariatric unit.
 - Is dropship appropriate for the 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 SCHEDLING, South Portland
 - 271882 SCHEDULING, Waterville
- **Due date:** Today's date
- **Comment:** HHA Visit Frequency, first week visits are assigned to Unassigned, Aide.