

Creating a Call

Creating a Call

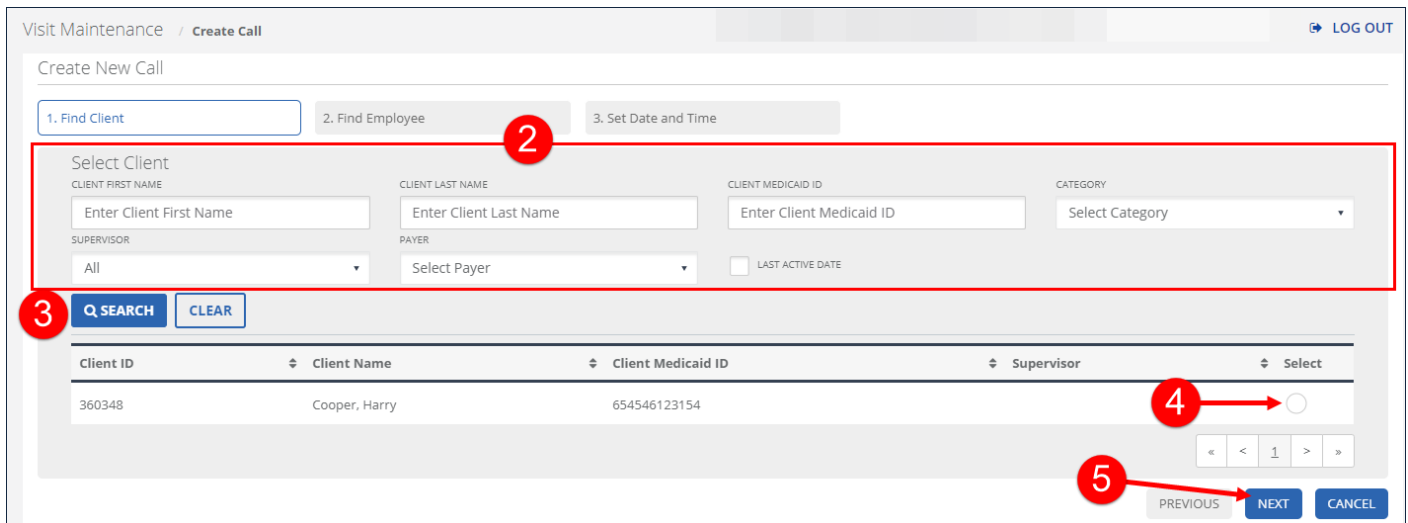
Use this functionality to create a manual call. When no calls or schedules exist, this functionality is used to create a visit with a call in. For example, if the employee forgot to call in, the call in is created with the **CREATE CALL** functionality and the call out is added using the **CALL LOG** section of the Visit Details screen.

1. Navigate to the Create Call screen. (**Visit Maintenance > Create Call**)

CREATE CALL

Create Call Button

2. Enter the search criteria in the Select Client section.
3. Click **SEARCH**.
4. Select a client to add to the visit.
5. Click **NEXT**.



Visit Maintenance / Create Call LOG OUT

Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

2

Select Client

CLIENT FIRST NAME CLIENT LAST NAME CLIENT MEDICAID ID CATEGORY

Enter Client First Name Enter Client Last Name Enter Client Medicaid ID Select Category

SUPERVISOR PAYER LAST ACTIVE DATE

All Select Payer

3 **SEARCH** CLEAR

Client ID	Client Name	Client Medicaid ID	Supervisor	Select
360348	Cooper, Harry	654546123154		<input type="radio"/>

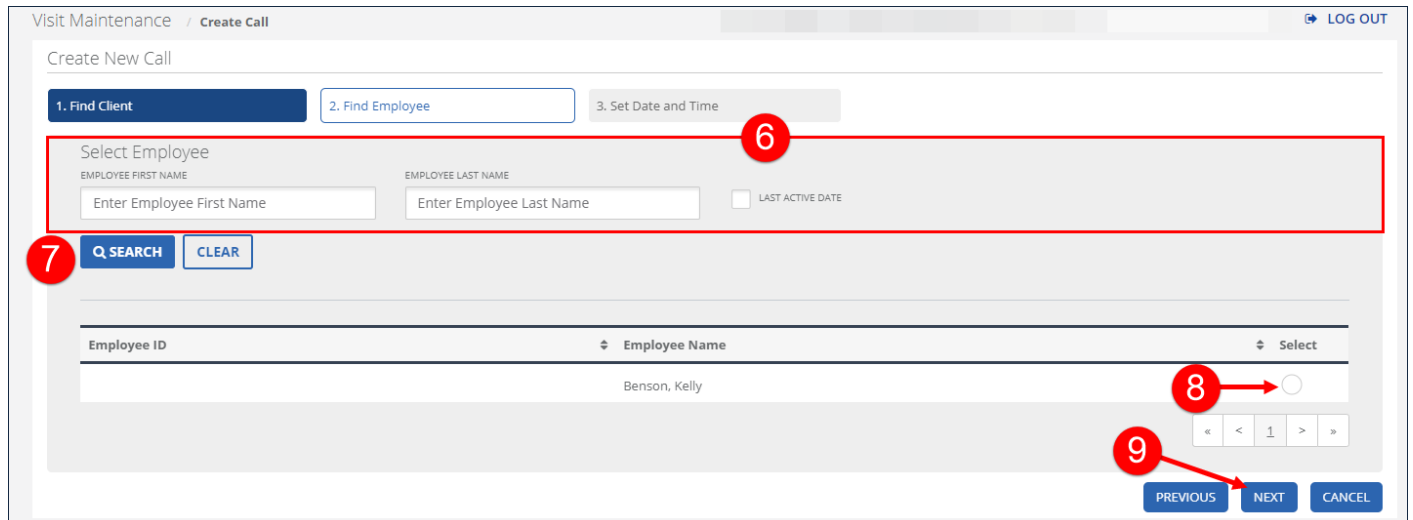
4 →

5 → **NEXT** PREVIOUS CANCEL

Create New Call - Select Client

6. Enter the search criteria in the Select Employee section.
In certain circumstances, the employee is pre-filled and this screen is skipped.
7. Click **SEARCH**.
8. Select an employee to add to the visit.

9. Click **NEXT**.



Visit Maintenance / Create Call LOG OUT

Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

6 Select Employee

EMPLOYEE FIRST NAME EMPLOYEE LAST NAME

Enter Employee First Name Enter Employee Last Name LAST ACTIVE DATE

7

Employee ID	Employee Name	Select
	Benson, Kelly	<input type="radio"/>

8

9

Create New Call - Select Employee

10. Enter the **DATE**.

11. Enter the **TIME**.

12. Select the **TIME ZONE**.

Time Zone should default based on the client's configured time zone.

13. Select the **SERVICE**.

14. Click **GENERATE GROUP VISIT CODE**, if applicable.

This button only displays for accounts configured to use advanced Group Visit functionality.

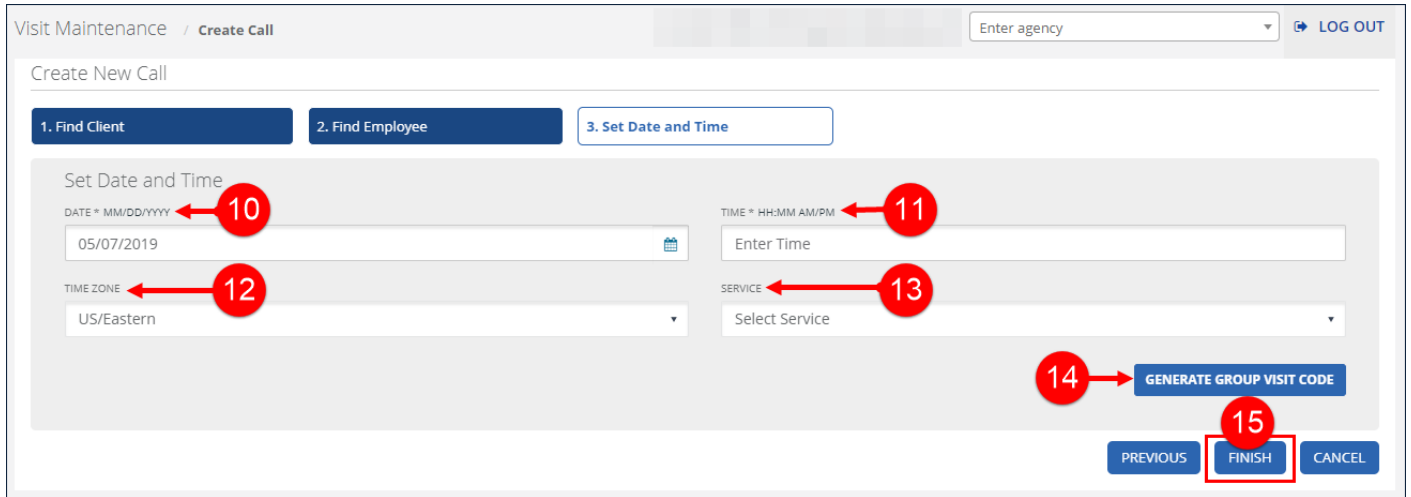


Note:

The **GENERATE GROUP VISIT CODE** button is only used to create a new group visit code. For example, if a group visit was performed but not captured by the system, users should use this functionality to create a group visit code and add this code to each visit that was part of the group. Use the Visit Details screen to add a visit to an existing group visit.

Creating a Call

15. Click **FINISH**.



Visit Maintenance / Create Call Enter agency LOG OUT

Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY **10**

TIME * HH-MM AM/PM **11**

TIME ZONE **12**

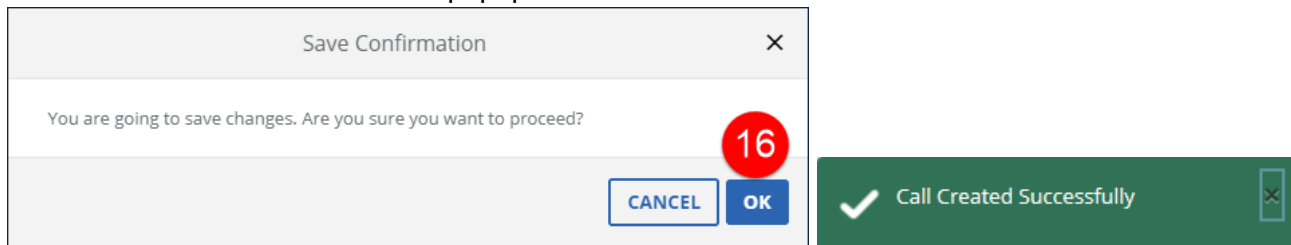
SERVICE **13**

14

15

Create New Call - Set Date and Time

16. Click **OK** on the **Save Confirmation** popup.



Save Confirmation ×

You are going to save changes. Are you sure you want to proceed?

16

✓ Call Created Successfully ×

Confirmation Messages