













Instructions to create and confirm a service journal for a scheduled activity

Action / Instruction	Screen Shot																											
Scenario: Patient has multiple workers assigned in 'Patient Resource Assignment' and has a specific charge rate for each discipline in 'Patient Negotiated Charge Information'																												
1. CLINICAL – Patient Profile – Demographics – Patient Resource Assignment link	<p>Patient: Test Status ID: 200510051334 Status: Admit SOC Date: 09/02/2005 Broward Office Age: 75</p> <p>Patient Resource Assignment   New Entry Show Deleted</p> <table><thead><tr><th></th><th>Edit</th><th>Delete</th><th>Worker</th><th>Visit Rate</th><th>Rate Basis</th><th>Shift Start</th><th>Shift End</th><th>Days of Week</th></tr></thead><tbody><tr><td></td><td>Edit</td><td>Delete</td><td>Jones, Bob</td><td>10.00</td><td>Hour</td><td></td><td></td><td>Monday, Tuesday, Wednesday, Thursday,</td></tr><tr><td></td><td>Edit</td><td>Delete</td><td>Potter Jr., James H</td><td>9.75</td><td>Hour</td><td></td><td></td><td>Monday, Tuesday, Wednesday, Thursday,</td></tr></tbody></table> <p>Back</p>		Edit	Delete	Worker	Visit Rate	Rate Basis	Shift Start	Shift End	Days of Week		Edit	Delete	Jones, Bob	10.00	Hour			Monday, Tuesday, Wednesday, Thursday,		Edit	Delete	Potter Jr., James H	9.75	Hour			Monday, Tuesday, Wednesday, Thursday,
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3. CLINICAL – Patient Profile – Visit Notes: Click [New Entry] button, select VN Name, enter start time/end time, select assessor (worker performing visit) select scheduled activity being completed with this visit note, check Confirmed checkbox.	<p>Patient: Test Status ID: 200510051334 Status: Admit SOC Date: 09/02/2005 Broward Office Age: 75</p> <p>Visit Notes  </p> <p>Visit Note Name: <input type="text" value="Victory Home Health Personal Care"/> Start Time: <input type="text" value="10/14/2005 10:30 AM"/> </p> <p>Visit Note Date: 10/14/2005 End Time: <input type="text" value="10/14/2005 12:00 PM"/> </p> <p>Assessor: <input type="text" value="Potter, James H, PCA (\$9.75/Hour)"/> Service Journal Transaction Code: <input type="text" value="RV, Routine Visit"/></p> <p>Scheduled Activity: <input type="text" value="10/14/2005, PCA, 10:15-11:45, Jan"/> Confirmed: <input type="checkbox"/></p> <p>Alternate Discipline: <input type="text" value="10/17/2005, PCA, 10:15-11:45, James"/> Alternate Charge Amount: <input type="text" value="17.8500"/></p> <p>Alternate Charge Basis: <input type="text" value="Hour"/></p> <p>Proceed to Visit Note Save Cancel</p>																											
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5. ANALYSIS & REPORTING – Operations – SJ Transactions grid: The service journal for worker JAMES POTTER visiting patient TEST STATUS on 10/14/2005 from 10:30A to 12:00P is 'Confirmed' and eligible for billing.	<div><div>GridFilterSaved FiltersCharts</div><div>SJ Transactions View PDF Export to Excel Expand All Collapse All</div><div>Drag a column header here to group by that column</div><table><tr><th>Worker ID</th><th>Worker Name</th><th>Start Date</th><th>Start Time</th><th>End Time</th><th>Duration</th><th>SJ Code</th><th>Patient Name</th><th>Cnf</th><th>Blb</th><th>Pyb</th><th>SJ Status</th><th>Sup</th><th>WrkCst</th><th>WorkerType</th><th>Discipline</th></tr><tr><td rowspan="7">5555509876</td><td>Jones, Michael J</td><td>09/02/2005</td><td></td><td></td><td>45</td><td>AD</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>10/05/2005</td><td></td><td></td><td>45</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>11/07/2005</td><td></td><td></td><td>45</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>12/12/2005</td><td></td><td></td><td>30</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>01/10/2006</td><td></td><td></td><td>30</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>02/15/2006</td><td></td><td></td><td>15</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>Jones, Michael J</td><td>03/06/2006</td><td></td><td></td><td>55</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Staff</td><td>RN</td></tr><tr><td>22</td><td>Potter, James H</td><td>10/14/2005</td><td>10/14/2005 10:30 AM</td><td>10/14/2005 12:00 PM</td><td>90</td><td>RV</td><td>Status, Test</td><td>Y</td><td>Y</td><td>Y</td><td>Confirmed</td><td>N</td><td>N</td><td>Full-time</td><td>PCA</td></tr></table></div>	Worker ID	Worker Name	Start Date	Start Time	End Time	Duration	SJ Code	Patient Name	Cnf	Blb	Pyb	SJ Status	Sup	WrkCst	WorkerType	Discipline	5555509876	Jones, Michael J	09/02/2005			45	AD	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	10/05/2005			45	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	11/07/2005			45	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	12/12/2005			30	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	01/10/2006			30	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	02/15/2006			15	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	Jones, Michael J	03/06/2006			55	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Staff	RN	22	Potter, James H	10/14/2005	10/14/2005 10:30 AM	10/14/2005 12:00 PM	90	RV	Status, Test	Y	Y	Y	Confirmed	N	N	Full-time	PCA
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