












Flags and Tasks

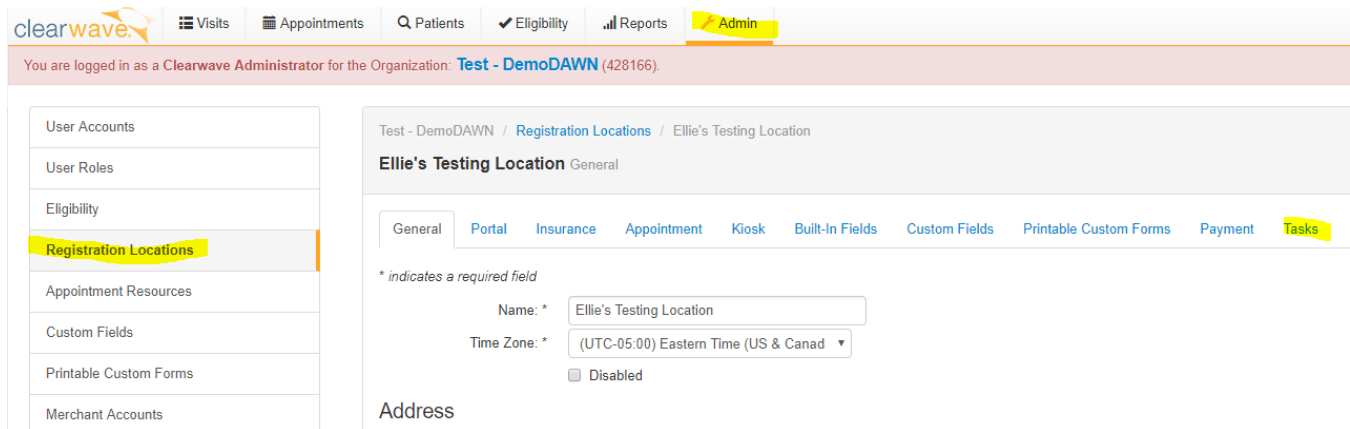
The below table shows all possible flags that can be triggered for an Appointment and/or a Visit:

	Demographics Changed at Kiosk – Notifies you of demographics updated during kiosk check-in
	Insurance Changed at Kiosk – Notifies you of insurance information updated during kiosk check-in
	Eligibility Data Conflict – Discrepancy between submitted and response from payer.
	Other Payer on File – Notifies you of additional payers the patient is subscribed with.
	Managed Care - Notifies you of applicable managed care plan information for Medicaid patients.
	Contact Other Entity – Notifies you of other entities to be contacted for eligibility and benefit information.
	Demographics Updated During Mobile Check-In – Notifies you of demographics updated during mobile check-in
	Insurance Updated During Mobile Check-In – Notifies you of insurance updated during mobile check-in
	Active Coverage for Self-Pay – Notifies you of insurance coverage for self-pay patient
	Insurance Card Uploaded at Kiosk – Patient scanned insurance card during kiosk check-in
	Possible Duplicate Patient Detected – Notifies you of possible duplicate patient

A task is a reminder for staff to do a certain action related to an Appointment, Visit or both. Tasks can be set to trigger on a variety of rules such as the type of appointment the patient is coming in for, or the provider, payer, age, etc.

****We strongly recommend that you contact support to set up tasks, unless you had superuser training****

Tasks can be set up under Admin > Registration Location, click on the location you would like to add a task for > Tasks tab:



The screenshot shows the Clearwave Administrator interface. At the top, there is a navigation bar with tabs for Visits, Appointments, Patients, Eligibility, Reports, and Admin. Below the navigation bar, a message indicates the user is logged in as a Clearwave Administrator for the organization 'Test - DemoDAWN (428166)'. On the left side, there is a sidebar menu with options: User Accounts, User Roles, Eligibility, Registration Locations (highlighted), Appointment Resources, Custom Fields, Printable Custom Forms, and Merchant Accounts. The main content area shows the 'Ellie's Testing Location' configuration page. The 'Tasks' tab is selected, and the 'General' sub-tab is active. The configuration includes fields for Name (Ellie's Testing Location), Time Zone (UTC-05:00 Eastern Time (US & Canad)), and a Disabled checkbox. A note indicates that an asterisk (*) denotes a required field.

Click on New Task, name the task and type in the instructions. Choose if the task should populate for a visit or appointment, then set the rule:

New Task

Task Information

Name

Patient Did Not Sign Consent

Required: Name describing the task to handle.

Instructions

The patient declined the consent at the kiosk. Please call the patient up to the front and get their signature on a paper copy.

Optional: Instructions presented to the user when handling the task.

Task Enabled For Visits

Task Enabled For Appointments

Expires after days - after being dismissed, task will not show up for patient's visits/appointments for X days

Task Rules

Rules and Conditions for when the Task is added to a Visit or Appointment.

and Only if the patient did not "accept" the following consent field (ID) : 1234

[Add Rule](#)

The next check-in that meets all the requirements for the task will populate as an alert on the dashboard under the Tasks column:

Scheduled **1** Failed **0**

CHK-IN	APPT	TRACKING	TASKS	PRI	SEC
09:38 AM	10:30 AM	Checked In	1		

Staff can address the task by clicking directly on the icon. It will open a new window, the directions on how to address the task will appear if the title of the task is clicked. Once the staff member has completed the task, they can close by clicking Close Task:

LEE, ELLIE e81b7b80-95f4-41a0-927f-10ee18c55a96



[Visit History](#) | [Appointment History](#)

☰ VISIT: 03/19/2018 09:38 AM - Ellie's Testing Location

▼ Tasks

1. ▼ Physician Group Patient Information Consent Not Signed

Close Task

Task created at 09:38:09 AM

The patient failed to sign the Physician Group Patient Information Consent form during their kiosk check-in. Please address this with the patient.

Close