Dial:

Access Code:

**Starting A Visit**

1. Call the documentation number upon arriving at the patient location to start the visit.
2. Once prompted, enter your Access code then the # key. ***If multiple patients are connected to a phone number you will be asked to either choose between two patients or enter the first name of the patient if three or more patients are connected to the number. You can spell the first name, enter a letter(s) and the # key, or simply press the # key without entering any part of the name to get the option to choose the patient.***
3. Choose 1 to Start a visit.
4. Dial-N-Document will automatically repeat the start time of your visit and disconnect.
5. Continue with your visit.

**Ending A Visit**

1. Dial the documentation number when your visit is complete to end the visit.
2. Once prompted by the system, enter your Access Code then the # key ***If multiple patients are connected to a phone number you will be asked to either choose between two patients or enter the first name of the patient if three or more patients are connected to the number. You can spell the first name, enter a letter(s) and the # key, or simply press the # key without entering any part of the name to get the option to choose the patient.***
3. Once prompted, choose 2 to End a Visit.
4. The system will now ask the questions for the items on the plan. Listen to the task, and choose your answer.
5. Press 1 to Review your codes, Press 2 to add a code, Press 3 to redo all documentation, Press 4 to delete a code, Press 5 to modify, Press 6 to approve. *In the majority of situations you will press 6 to approve and send your completed visit.* This is the final step in your end visit documentation. If you choose options 1 – 4, the system will go through the process of that step, and then loop back to giving you options 1-6 again.
6. Dial-N-Document will tell you that your visit has been sent and will automatically disconnect.

**Reminders**

1. Start and End your visit documentation from the patient phone, unless otherwise instructed.
2. Have the Dial-N-Document Documentation number, agency ID, and your access code with you at all times when performing visits. You must have these three things to document with telephony.
3. Listen to the Dial-N-Document automated attendant and follow the instructions.
4. Notify your office if you have an issue regarding telephony, or properly starting or ending your visits.
5. If you neglect to end the visit via telephony before leaving the patient, the visit will be incomplete, and you cannot end the visit at another patient home or even upon the next visit with that patient. When you call for your next visit you should press 1 to start your visit as usual, the system will say: “You already have a visit in progress, you will need to get a signed time slip from the patient in order to properly record the end of the visit. Please stay on the line to start your visit”. Make sure that you remain on the line through this entire message to start your new visit. Make sure you contact your supervisor to make them aware of the incomplete telephony visit and to relay the appropriate visit information.
6. The ending prompts and options after you have entered your tasks codes are as follows: **Press 1 to Review your codes:** *The system will review the task codes you have entered and then circle back to the main prompt to allow you to move on.,* **Press 2 to add a code:** *The system will prompt you to enter a task code that you would like to add to the tasks you already entered*, **Press 3 to redo all documentation:** *The system will erase all tasks you have entered and prompt you to re-enter your task codes from scratch,* **Press 4 to delete a code:** *The system will prompt you to enter a task code that you would like to remove from the tasks you entered,* **Press 5 to modify:** *You will not use this option at this time. This option is for documentation that is entered in a question answer format or yes or no,* **Press 6 to approve:** *Completes and sends the documentation.*