



Netsmart EHR

July 2026

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Clinical staff (tablet users)

Enhancements

- If an inactive Provider is selected when adding Goals / Interventions, a warning message will appear stating, "The physician you have selected is Inactive during the timeframe of this entry."
- SFV needs to be scheduled within the two-day requirement CMS quality outcome.
 - **Visits will now be able to be scheduled outside the 2-day requirement, a checkbox will appear asking to confirm the visit is being scheduled more than 2 days after symptom impact screening occurs that requires an SFV.**

Resolved Issues

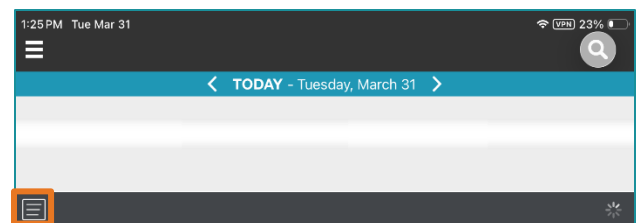
- **Copy Note** functionality within Clinical Notes now works as designed.
- **Assessment indicator** accurately displays the progress for completing an assessment, preventing it from being submitted before complete.
- The fatal error for **M2420 Discharge Disposition** no longer displays when validating an assessment.
- **PHQ-2 Depression screening** now works as designed.
- Resolved issue where **J0910 Comprehensive Pain Assessment** was shown as incomplete after assessment was submitted.
- **Load More** function now works as designed.
- Fixed the issue where text overlapped on various screens.

Known Issues

- When documenting symptom impact of moderate or severe, a pop-up will not appear to schedule an SFV, a fatal warning will display.
 - **This fatal warning is a reminder to schedule that SFV prior to leaving the patient home.**

Frequently Asked Questions

- Where is the Sync Status?
 - **Look for the small box with moving lines at the lower left to monitor sync progress.**
- Accidentally tapped Start Visit?
 - **Do NOT tap End Visit or add documentation.**
 - **Return to the Today screen and tap the Undo arrow to cancel the visit.**



- How do I navigate the Calendar?
 - From the Patient Calendar, tap **Calendar** above the month view on the left to open your calendar.
 - Tap **Show Details** (lower left) to view Visit Frequencies
 - Tap **All** (top right of the box) to see all frequencies.
- Delete Multiple Visits
 - Tap the three dots and select **Delete Visits**.
 - Edit the **End Date** to three months out to extend beyond the cert period.
 - Tap **Filter** to load upcoming billable visits and use the left column checkboxes to select visits to delete.
- Staff Calendar
 - Tap **Staff** and enter a last name to view a schedule.
 - Enter **Una** to view Unassigned visits.
 - If assigning a visit, notify Scheduling.

Important Reminders

Resetting cache

- Before resetting cache, **log out** of Netsmart first.
 - Place finger at the bottom middle of the screen then slowly swipe up about halfway.
 - Swipe the blue box for Homecare up and off the screen.
 - If not logged out first, the system will attempt to reset the cache at the next login.
- **Recommendation:** Reset cache at the beginning of each day to help prevent issues.
 - **Any documentation in Netsmart that has not been submitted will be deleted and cannot be retrieved.**
- If the reset cache message appears and you do not want to reset the cache, swipe up to return to the main screen. Tap the Settings icon and inactivate Reset Cache.

Turning off your iPad

- Turning off the iPad is important to allow automatic updates to occur.
 - Charge the iPad before turning it off.
 - If the iPad is plugged in after turning it off, it may turn itself back on.

Marking a visit as Unmade or Patient Refused

- If the visit is cancelled before traveling to see the patient and is not moved to later in the week/month, the visit is marked as **Unmade**.
- If the visit was refused/patient was not home or available after traveling to the home, change the visit type to **Patient Refused** with visit. This allows adding Travel time and mileage for reimbursement.