



From the Office of Clinical Informatics
Home Care and Hospice
Netsmart Monthly Newsletter

March 2023

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CI Assistance

Cheat Sheets

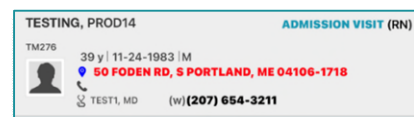
- [Clinical Informatics Education \(https://ci.northernlighthealth.org/netsmart/\)](https://ci.northernlighthealth.org/netsmart/): To ensure you always have the most up-to-date information, be sure to access Cheat Sheets on the Clinical Informatics Netsmart Education Portal.

Support

- CI provides **virtual rounding** on a daily basis, Monday through Friday, with time slots alternating between morning and afternoon.
 - Please refer to your Outlook Calendar invite, and plan to attend to ask questions related to the Netsmart clinical EHR.
- If not able to attend a virtual rounding session, please **submit a Help Desk ticket** through the **Self-Service Portal** or by calling the **Help Desk 1-888-827-7728**.

Known Issue

- If the **Service location** **Service Location** on the Basic screen is **not chselected**, the address will display in **red font**. If **Service Location** is **not identified**, the following will pop up: Please ensure future visits scheduled for patients are updated with an active Service Location.



Resolved Issues with Update 4.17.5


- On Tuesday, March 14, an update will occur to resolve the following issues:
 - Occupational Therapy (OASIS E) OT Assessment is corrected.
 - You no longer need to complete two Assessments.
 - A Clinical Note can now be edited as needed and an error will no longer occur.
 - The work around to copy, delete and generate a new note no longer will be needed.
 - M1060 Height and Weight fields will now accept values without disappearing.
 - Enter Height and Weight in the Assessment as appropriate.
 - Discharge Assessment – J1800 Any Falls Since SOC/ROC will allow an answer No and not require documentation for J1900 Number of Falls.

Frequently Asked Questions

Pediatric Assessments

- The Pediatric Assessment template is only available to Skilled Nursing on the tablet. All other disciplines will use their regular **Discipline** Assessment.

Marking a Visit Unmade

- Prior to checking **Unmade** on **Time Entry**, remove the Start and End time as necessary.
 - Add a Clinical Note to indicate why the visit was Unmade.
 - If **Start Visit** is tapped, the visit needs to be marked Unmade. Navigate back to the **Today** screen to tap undo  within the patient visit box.
 - Mark the visit as Unmade on Time Entry.
 - If the Unmade visit is synchronized and times are associated, reach out to your manager to remove the times, sync the iPad, then mark that visit unmade again.

10 Minute Rule

- If a visit needs to be added to the Calendar or the Visit Type is changed, the visit must be on the calendar a minimum of 10 minutes before tapping **Start Visit** or initiating any clinical documentation.
 - Add the visit to your calendar and synchronize before leaving for the patient visit.

Patient Phone Numbers

- The **default Contact Number** for a Medicaid patient can only be **Home** or **Mobile** in order for the transmission of visits to flow into the appropriate database.
 - The **Contact Numbers Type** cannot show more than one **Home** or **Mobile** listed, even though only one will be the default.

NOTE: If more than one contact number is selected, an error will occur, and the transmission will fail. Any visits that fail to be transmitted must be re-entered manually by someone in the office.

Unverified List helpful hints

- Activities showing as unverified:
 - Do not add a time on the calendar as this will cause it to upload and not auto verify.
 - To add the time, enter **Start** and **End time** on the Time Entry screen.

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- If all documentation for a patient visit is complete, it **may** submit and not auto verify. Check the following screens if the visit is on the unverified list:
 - **Visit Frequency:** if there is no visit frequency, overlapping or missing dates, or the start date is after the end date, any of these will need to be corrected.
 - **Authorizations:** if there are issues, send a task to Insurance Authorization with the information.

Adding Care Plans

- When adding a care plan for another discipline, ensure the discipline is selected in the navigator prior to adding the care plan.

- Adding a **HHA Care Plan:**

STEP 1: Tap **Care Plan/Charting**.

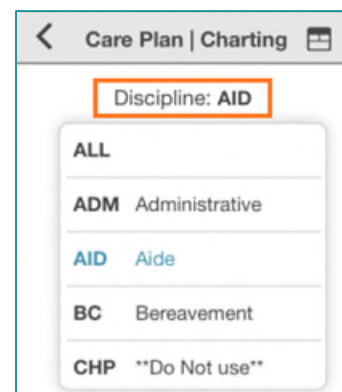
STEP 2: Tap **Care Plan Editing** at bottom of screen.

STEP 3: Tap + in lower right.

STEP 4: In the Search box, enter **HHA (for Hospice)** or **Aid (for HH)**.

STEP 5: Tap **Aide Care Plan**.

STEP 6: Tap + to the far right of Interventions to add interventions.



Tablet Power, Tablet App, and Netsmart App

- For the Tablet to work in the most efficient way, close all the applications at the end of each day and power off your iPad. If your iPad needs to be charged, plug it in prior to powering off.
 - App Closure
 - Using the screen: Swipe the screen up and swipe the **Netsmart** window up to close.
 - Using the keyboard: Tap the key with the 6 squares (above the 4 key) and swipe-up on the **Netsmart** window to close.
 - Powering Off your iPad
 - Press the **Power** button located on the top of the iPad and the **Volume Up** button simultaneously. The message that says, *slide to power off* appears, slide your finger across.
- As a reminder, **reset your cache** at least once a week.
 - **Prior to resetting your cache, ensure that all documentation is complete and there are no open charts as to not delete any information not submitted.**

 [Click here to learn more on how to reset the cache](#)

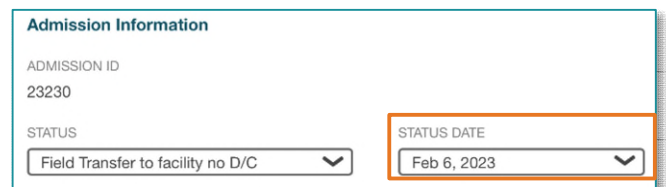
Patient Visits

- Patient visits, such as a **Documentation/Patient Call**, require a direct start and end time.
 - First, add the visit to the **Patient Calendar** and then select **Done and Navigate**.
 - Next, tap **Start Visit**, add a Clinical Note, then tap **End Visit**. Navigate to **Time Entry** to adjust the **Direct Start** and **End time**. If mileage is added by the system, replace the entry with a zero.
- Team members caring for Medicaid patients need to schedule patient visits on the calendar at the time closest to when you will arrive at the patient's home.
 - The Medicaid patient's visit must be started within one hour of the scheduled visit time to comply with regulatory requirement changes that went into effect on January 1, 2023.

Hints and Requirements:

- While in the patient's chart, the patient's insurance information can be found in the bar at the top of the screen.
 - Insurance information is also available on the **Payers/Authorization** screen.
 - Schedule Medicaid patients' visits as close to your planned arrival time, as possible.
 - The visit must be started within one hour of the scheduled visit time.
- **Transfer Visit Patient Status Date**

- The **Status Date** needs to match the date of when the patient was transferred to a facility. This date has downstream effects to reactivating medications when the patient returns home.



The screenshot shows a form titled "Admission Information". It contains the following fields:

- ADMISSION ID: 23230
- STATUS: Field Transfer to facility no D/C (with a dropdown arrow)
- STATUS DATE: Feb 6, 2023 (with a dropdown arrow)

The STATUS DATE field is highlighted with an orange border.

- **Reactivating Medications**
- If a patient is being readmitted and the dates of the transfer and the discontinue date of medications are aligned and were not edited, the reactivate option will be available.
 - Tap the ellipsis (...) and tap **Reactivate** to add the medications the patient is still taking from the last admission.

Start and End Visit

- Select **Start Visit** when you enter the home. This ensures all documentation is attached to the visit appropriately.
- When leaving, tap **End Visit** before leaving the service location and obtain the applicable signature. If this is not completed in the patient's home, you run the risk of not obtaining a signature, which is a required component of billable visits. If delayed leaving after tapping End visit, tap Done on the Patient Signature screen to record the correct End time.

Attaching Documentation to a Visit

➤ Assessments

- Select the assessment, then tap the ellipsis (...). Tap **Connect to Visit/Phone Call** then select your visit from the list.




➤ Clinical Note

- Select the applicable note, select copy note in the bottom right corner.
- Tap **Add** to add a new note, within the Note section, tap twice and select **Paste**. Add visit date and Use Code.
- Navigate to the note below (note not attached to the visit) and scroll to the bottom and select the trash can.

➤ Care Plan Charting

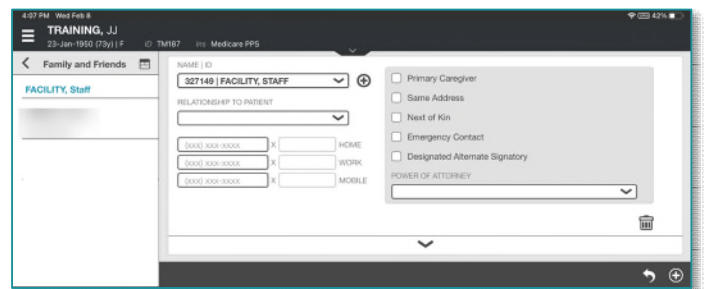
- Go to **Open Charts** and click **Care Plan Charting**.
- Change a charted response to a different response and then select the progression response as originally documented. Example: (tap any circle for **No** then tap the cirlet o change the answer back to **Yes**).

Finishing the Day

- Have you managed Open Patients-no number on the menu? 
- Have you submitted your visit(s) from time entry? 
- Have your activities synchronized - are they in gray font on the **Today** screen?
- Do you see the green checkmark on the **Today** screen to indicate the visit was sent to host? 

Friends and Family

- **Friends and Family** should be reviewed and updated as necessary.
- Resources within this screen also enable the appropriate resource to sign when a visit is completed.
 - To add a member to the **Friends and Family** list, tap + in the bottom corner.
 - Within the **Name/ID** field, search for the appropriate resource, such as facility staff, and then select from the list.
 - Indicate the relationship for the resource as well as the contact information.
 - Indicate if the resource is an emergency contact, designated alternate signatory, etc., to enable the appropriate actions to be taken.



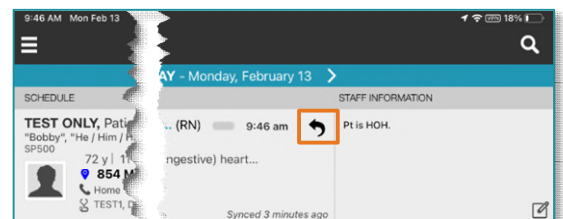
Troubleshooting

Time Entry

- If the end time is blank on the **Time Entry** screen, the action of tapping **End Visit** needs to be performed.
 - If the Start time is not before the current time, manipulate the time to not overlap with any other visits.
 - Temporarily change the visit type to **Routine Visit Transcription** if needed.
 - Tap the patient's name above **Travel Time** and tap **End Visit**.
 - Tap **Time entry** on the menu and update the **Start** and **End time** and the **Visit Type**.
- **Error when submitting a visit**
 - If an error displays when submitting a visit, review where the error occurred.
 - An error may occur if documentation has been corrected. If this occurs, documentation needs to be recreated and the documentation with the error needs to be deleted.

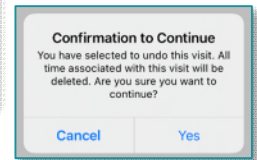
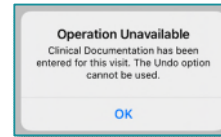
Start Visit Accidentally Selected

- If **Start Visit** is selected by accident and no required documentation was entered, navigate to **Today** and tap **undo**. Follow the prompt to finish deleting the **Start Visit** action.
- If **Start Visit** was selected by accident and required documentation was started, delete the required documentation, and then navigate to **Today** and tap **undo**.



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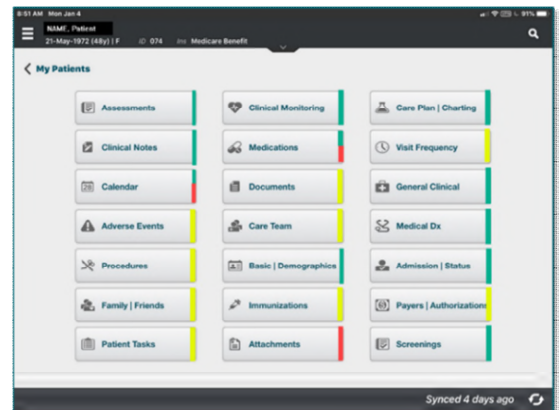
- If there is required clinical documentation, it must be deleted. An alert will appear to remind you.
- Click **Yes** to confirm that you want to delete all times associated with the visit.



Connectivity

- If you know you are going to be in a location with poor cellular reception, add this information to the staff information box on the **Today** screen for other care providers to be aware.
- If in an area where cell service is not always available, place the tablet in **Airplane Mode** before beginning the day.

- Placing the tablet in **Airplane Mode** allows clinicians to view patient charts and document offline
 - Green indicates item may be viewed and edited offline.
 - Yellow indicates item may be viewed but not edited.
 - Red indicates item may not be opened or edited.



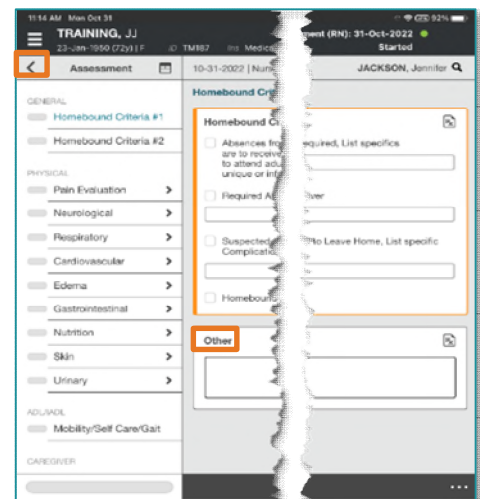
➤ **Putting the tablet in Airplane Mode**

- Locate and tap **Settings** on the home screen.
- Slide to activate button for **Airplane Mode**.
 - When cell service is restored, inactivate **Airplane Mode**.



➤ **Documentation**

- In make the assessment available in **Airplane Mode**, add a new assessment and document a period in the other box.
- Tap the back arrow in the top left next to **Assessment** to save. This will allow finishing it in Airplane Mode.
- When **Airplane Mode** is turned off, complete any other documentation, and submit.



For questions regarding process and/or policies, please contact your Clinical Educator or Clinical Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.