



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

February 2023

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CI Assistance

Cheat Sheets

➤ [Clinical Informatics Education Portal](#)

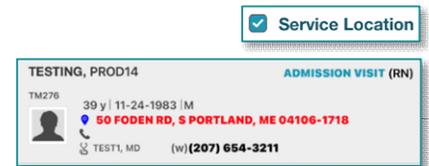
- It is best to always reference this site, to have the most up-to-date information.

Support

- CI provides **virtual rounding** daily, alternating between morning and afternoon time slots.
- 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 the virtual rounding, please **submit Helpdesk tickets** through the **Self-Service Portal** or by calling the **Help Desk 1-888-827-7728**.

Known Issues

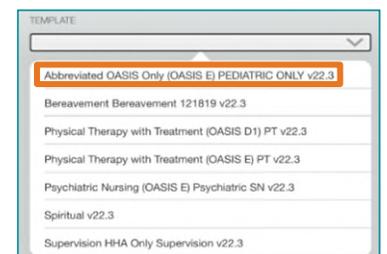
- If the **Service location** on the basic screen is **not checked off**, the address will display in **red font**. This issue is still occurring for some patients, even if the service location is selected.
- Please ensure future visits scheduled for patients are updated with an active Service Location.



Frequently Asked Questions

Pediatric Assessments

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



Marking a Visit Unmade

- Prior to checking **unmade**, remove the start and end time as necessary.
- If the unmade visit is synchronized and times are associated, reach out to your manager to remove the times and then mark that visit unmade again.
 - If **Start Visit** is selected and you are not able to delete that action, mark the visit as Unmade.

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.

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- Add the visit to your calendar and synchronize before leaving for the patient visit.

Patient Phone Numbers

- The **default** for **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.
- If all documentation for a patient visit is complete, it will 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 group with the information.

Adding Care Plans

- When adding a care plan for a 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**.

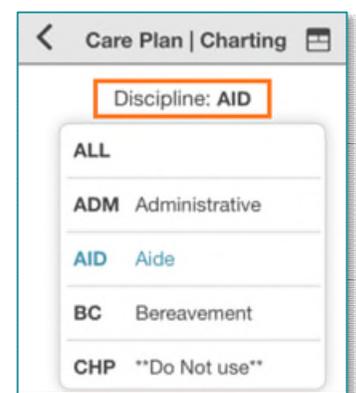
STEP 2: Tap **Care Plan Editing** at bottom of screen.

STEP 3: Tap + in lower right.

STEP 4: In the Search box, enter **HHA** or **Aid**.

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
 - To close the app using the screen, swipe the screen up and swipe the **Netsmart** window up to close.
 - To close the app using the keyboard, tap the key with the 6 squares (above the 4 key) and swipe the **Netsmart** window up 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 the documentation, then tap **End Visit**. Navigate to **Time Entry** to adjust the **Direct Start** and **End time**.
- 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.

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➤ Transfer Visit 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.

Admission Information

ADMISSION ID
23230

STATUS
Field Transfer to facility no D/C

STATUS DATE
Feb 6, 2023

➤ 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 the visit, 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.

Attaching Documentation to a Visit

➤ Assessments

- Select the assessment, then tap the ellipsis (...) and select **Connect to Visit/Phone Call**.

➤ 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**.
- 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 progression responses to a different response and then select the progression response as originally documented.

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Finishing the Day



- Have you managed Open Patients?
- Have you submitted your visit(s) from time entry?
- Have your activities synchronized?
- 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 staff 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, or etc.. To enable the appropriate actions to be taken.

Troubleshooting

Time Entry

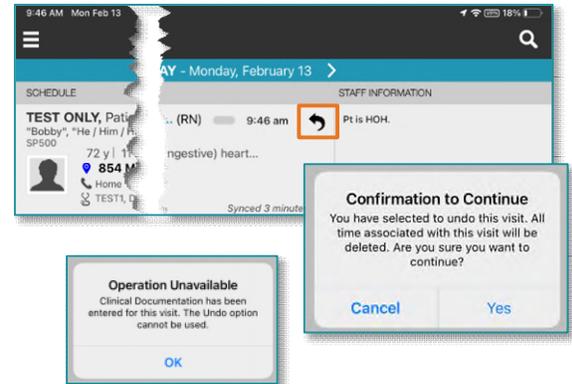
- If the end time is dithered on the time entry screen, the action of tapping **End Visit** needs to be performed.
 - If the Start time is not before the current time, manipulate the time to not interact with any other visits.
 - Change the visit type to **Routine Visit Transcription** if needed.
 - Tap the patient's name above Travel Time and tap **End Visit**.
 - Tap **Time entry** on the tile page and update the **Start** and **End time** and the **Visit Type**.

➤ Error when submitting a visit

- If an error displays when submitted 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**.
 - An alert displays indicating the operation is unavailable if there is required clinical documentation entered on a visit.



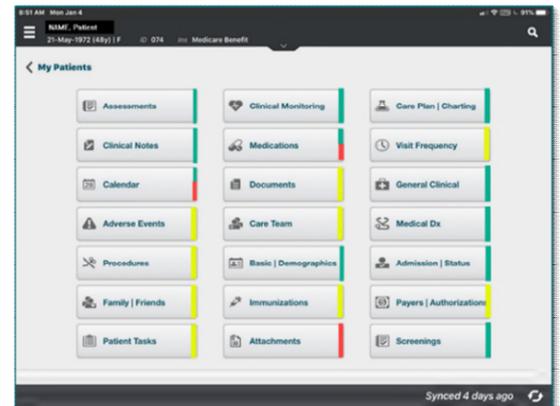
Connectivity

- 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 returned to cell service, inactivate **Airplane Mode**.



➤ Documentation

- In order for the assessment to be 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.
- When **Airplane Mode** is turned off, complete the documentation, and submit.

