

When an Aide is part of patient care, a Care Plan, Visit Frequency, and a Patient Task are documented so visits may be added and completed.

## Create Care Plan

➤ From the patient's chart

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

**STEP 2:** Select Care Plan Editing, at the bottom of page.

**STEP 3:** Change Discipline, in column on left side, to ALL.

**STEP 4:** Click + in the lower right corner.

**STEP 5:** In the Add New Care Plan box

- Enter H550 for Hospice
- Enter B100 for Home Health

**STEP 6:** Select the Aide Care plan.

**STEP 7:** Click + sign to the right to add GOALS.

**STEP 8:** Select Goals for problem, check appropriate box(es) and click DONE.

**STEP 9:** Add MODIFIER to each Goal, if applicable.

**STEP 10:** Click + sign to the right to add INTERVENTIONS.

**STEP 11:** Click Discipline, in dropdown select AID.

**STEP 12:** Select Interventions, click the box next to each intervention to be added.

**STEP 13:** Click Discipline, in dropdown select SN.

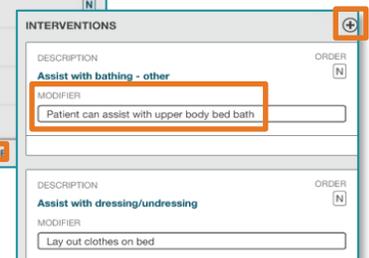
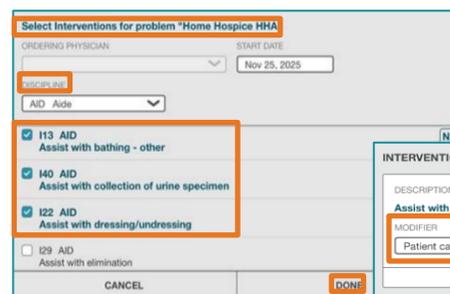
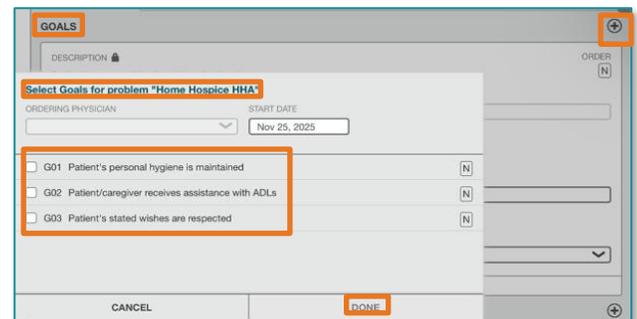
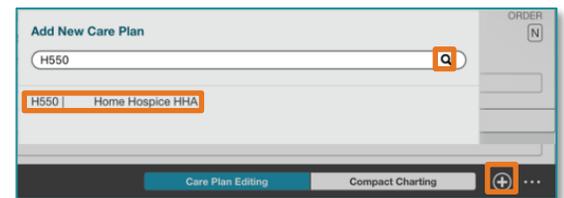
**STEP 14:** Select Interventions, click the box next to each intervention to be added.

- This is a required step so the Care Plan displays under **Care Plan Charting** for Nursing visits.

**STEP 15:** Click DONE.

**STEP 16:** Add MODIFIER to each Intervention, if applicable.

**STEP 17:** Select the < back arrow in top left to save and return to the previous page.



## Create Visit Frequency

➤ From the patient's chart

**STEP 1:** Select Visit Frequency.

**STEP 2:** Tap + sign in the lower right corner.

**STEP 3:** Tap the DISCIPLINE dropdown.

**STEP 4:** Select AID – Aide.

**STEP 5:** Add VISITS for the week, month, etc.

**STEP 6:** Add DURATION (week, month, daily, etc.).

**STEP 7:** Enter length of duration in the FOR field.

**STEP 8:** Tap START DATE, add the date when the visits will start.

- The End Date will automatically populate from the set duration.

**STEP 9:** Select the < back arrow in top left next to Visit Frequency.

**STEP 10:** Enter Netsmart password to sign off on the visit frequency.

**STEP 11:** Tap SUBMIT.

**STEP 12:** Select the < back arrow in the top left to Save and return to the previous page.

## Add Visit to Patient's Calendar

➤ Adding first week of visits to patient's calendar.

**STEP 1:** Select Calendar.

**STEP 2:** Click + sign in lower right corner.

**STEP 3:** Enter UNA in RESOURCE box.

**STEP 4:** Select the UNASSIGNED, (location) resource.

**STEP 5:** Click RESOURCE TYPE dropdown arrow.

**STEP 6:** Select Home Health Aide.

**STEP 7:** Add Visit Type:

- Hospice HHA Visit for Hospice patients.
- Routine Visits for Home Health patients.

**STEP 8:** Tap DONE.

- Add more visits for the 1<sup>st</sup> week if applicable.

**STEP 9:** Select the < back arrow in top left to Save and return to the previous page.

**Create Patient Task**

➤ From the patient's chart

**STEP 1:** Select Patient Tasks.

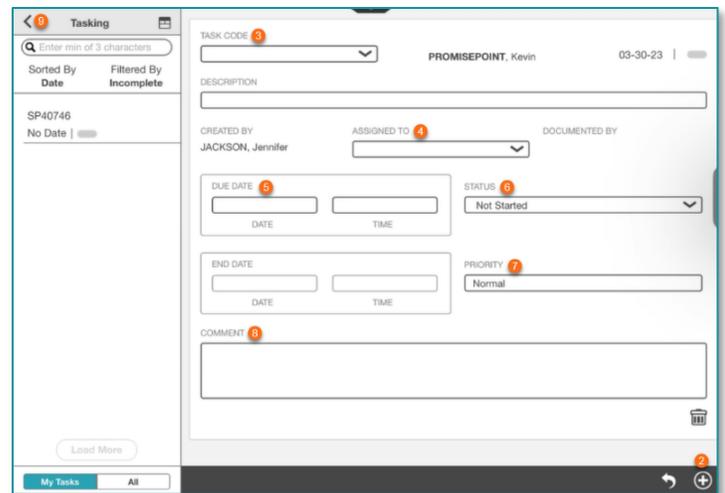
**STEP 2:** Click + sign in lower right corner.

**STEP 3:** Select TASK CODE.

- Add Task Code: **Need to schedule assigned discipline**, in the box.

**STEP 4:** Select ASSIGNED TO.

- Add one of the following to assign group.



185721 SCHEDULING, Bangor	185719 SCHEDULING, Presque Isle
306405 SCHEDULING, Coastal HH only)	306404 SCHEDULING, Sebago Lake (HH only)
185719 SCHEDULING, Ellsworth	169765 SCHEDULING, South Portland (HOS only)
306406 SCHEDULING, Portland (HH only)	271882 SCHEDULING, Waterville

**STEP 5:** DUE DATE: Leave blank.

**STEP 6:** STATUS: Defaults to Not Started

**STEP 7:** PRIORITY: Defaults to Normal, update, as necessary.

**STEP 8:** COMMENT: HHA Visit Frequency, first week visits are assigned to Unassigned, Aide.

**STEP 9:** Select the < back arrow in top left to save and return to the previous page.

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket](#) to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.