

The Today, Calendar and Time Entry screens are utilized throughout the day to document time and mileage associated with Visits and Activities.

Today

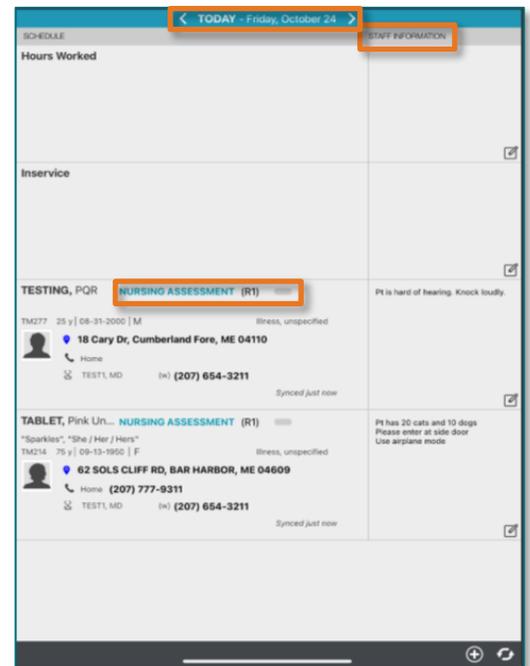
The Today screen is the default screen when logging into Netsmart. This screen displays the visits scheduled for the date selected as well as any activities that have been entered. The Today screen also updates to provide the visual indicators that visits have been submitted, and the activities have synced.

➤ Date

- Tapping the date at the top opens the Calendar to easily choose another date.
- Tapping the arrows to the left or right change the date forward or backwards up to 7 days.

➤ Patient Visits

- Tapping the **Visit Type** in blue font opens the patient's chart. Opening the chart from the Today screen to start the visit connects the documentation.
- Documentation progress for a visit displays in the **pill indicator** to the right of the visit type.
- Time since chart was last synced displays at lower right of box with patient visit.
- When documentation has been completed and submitted, this icon will appear in the box with the patient visit. 
- Tapping the patient's address displays directions to the home.
- Tapping the Provider's phone number displays the contact numbers and the patient Care Team information.



➤ Activities

- Activities added to your Calendar.
- Description in **black font** – has **not** been submitted.
- Description in **gray font** – **has** been submitted and cannot be edited on the tablet.

➤ Staff Information

- This space allows staff to enter information related to the patient's home situation such as pets in home or patient is hard of hearing.
- This can be edited on the **Today** screen by tapping the **pencil icon** or the **Basic** screen.

Calendar

Calendar provides a week or day view of a staff's schedule. Can view patient's calendar within chart.

➤ Adding a Visit or Activity

STEP 1: Select **+Add** then tap **Visit** or **Activity**.

STEP 2: To add a **Non-recurring visit** or **activity**.

- Visit – add the patient, date of visit, Resource type (if not auto-populated) and Visit type (if not auto-populated). Schedule note at end of box can have information added.
- Activity – add Resource type (if not auto-populated), Date and Activity. Optional to add Start and End time. These times will not appear on Time Entry so will need to be added to that screen. Schedule note at the end of the box can have information added.

STEP 3: To add **Recurring visits** or **activities** – tap **Recurring** at top of box.

- **Visit** – add Patient, Start Date, Recurrence (times and duration), Service Days, 1 Hr Duration for each Service Day, every week (leave as is if scheduling for each week) and for (number of days or weeks). Schedule note at the end of the box can have information added.
- **Activity** – add Resource type (if not auto-populated), Activity and Start date. Recurrence (times and duration), Service Days, Duration for each Service Day (1 hr), every week (leave as is if scheduling for each week) and for (number of days or weeks). Schedule note at the end of the box can have information added.

STEP 4: Confirm order is correct then select **Done**.

➤ Deleting an individual visit or an activity

STEP 1: Tap the **Day tab** at the bottom of the screen.

STEP 2: From the Calendar **Day view**, navigate to the date using the left and right arrow at the top.

STEP 3: Tap the **trash can icon** to delete. If it is not available, the visit or activity cannot be deleted.

- If the visit has been started and/or has documentation connected, it cannot be deleted.
- If an activity has Start and End time entered on Time Entry, the system will sync it so it cannot be deleted.

➤ Deleting multiple visits

STEP 1: Tap the **3 dots** at the lower right.

STEP 2: Tap **Delete visits**.

STEP 3: Change the **End date** to 3 months out to cover the current Certification period.

Service Day	Time	Duration	Service Location
<input type="checkbox"/> Sun		1 hr	Home
<input checked="" type="checkbox"/> Mon		1 hr	Home
<input type="checkbox"/> Tue		1 hr	Home
<input type="checkbox"/> Wed		1 hr	Home
<input checked="" type="checkbox"/> Thu		1 hr	Home
<input type="checkbox"/> Fri		1 hr	Home
<input type="checkbox"/> Sat		1 hr	Home

Monday - October 27, 2025

TEST, Jacqueline
TM170
ILLNESS, UNSPECIFIED
Medicare PPS

NURSING ASSESSMENT (R1)

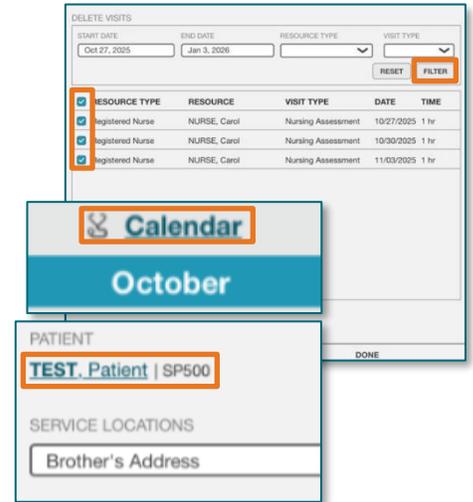
STEP 4: Tap **Filter**.

STEP 5: Tap the box next to **Resource Type** to choose all visits.
 Tap the box next to each individual visit to choose them to delete.

STEP 6: Tap **Done**.

➤ **Toggling** between Calendars

- From a Patient's Calendar, tap **Calendar** above the month view to open your calendar.
- From your Calendar, open a patient's visit then tap on their **name** to open their chart. Tap the **Calendar** tile from there to open their calendar.



Time Entry

Time entry is the screen to view time associated to a visit or an activity.

➤ **Overview**

- Visits are manually submitted once all documentation is complete. Activities auto-sync once a Start and End time have been added on the Time Entry screen.
- Schedule notes that are entered on a visit or activity, are viewable on Time Entry by tapping Notes.
- If the fields are not editable, the visit or activity has been submitted.
- Information on the Visits tab include Visits which have been started and Activities added to the calendar.
- Under the Patients tab, documentation not connected to a visit is displayed.
- Total Direct time, Indirect time, Travel time, Total time and Mileage populate at the bottom based on the information entered on Time Entry. Direct time includes time entered under Hours Worked. Recommendation is to add Hours Worked at the end of the day which allows checking the actual Direct Hours entered first.



Direct -15 hr 3 min | Indirect -2 hr 14 min | Travel -2 hr 57 min | Total Time -20 hr 14 min | Mileage -68.19mi

➤ **Submitting a visit**

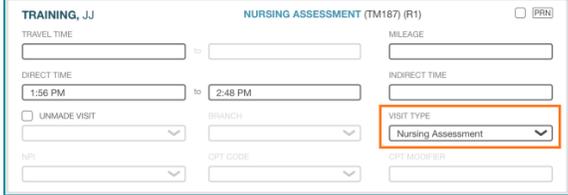
STEP 1: When documentation is complete, tap the  in the bottom right-hand corner.

- The list of patients displays to indicate screens with documentation to be submitted.
- Tap box to uncheck any patient whose documentation you do not wish to submit yet.
- If the visit was from a previous date, move to that date at the top of the screen using the arrows or tap **Time Entry** from the visit on the Open Charts screen.

STEP 2: Enter your password, this is your electronic signature signing off on the information being submitted.

➤ **Updating the Visit Type**

- If a visit has already been started and the visit type needs to be updated, navigate to the **Time Entry** screen and locate the patient visit.
- If you traveled to the patient's home then the visit was not made, change the visit type to **Patient Refused with visit**. This will require a Clinical Note and will allow you to document your time and miles.
- Update the **Visit Type** using the drop-down.



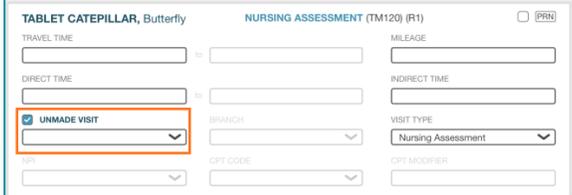
The screenshot shows the 'Time Entry' screen for patient 'TRAINING, JJ'. The visit is titled 'NURSING ASSESSMENT (TM187) (R1)'. The 'VISIT TYPE' dropdown menu is highlighted with an orange box and currently shows 'Nursing Assessment'. Other fields include 'TRAVEL TIME', 'DIRECT TIME' (1:56 PM to 2:48 PM), 'MILEAGE', 'INDIRECT TIME', 'UNMADE VISIT' (unchecked), 'BRANCH', 'NPI', 'CPT CODE', and 'CPT MODIFIER'.

➤ **Making a Visit Unmade**

STEP 1: To mark a visit **Unmade**, navigate to the visit on **Time Entry**.

STEP 2: If any Direct Time and/or Travel Time populates, remove before marking as Unmade. If this is not done, the time will need to be removed by someone with Host access so other visits or activities can be documented at those times.

STEP 3: Check **Unmade Visit** and select the drop-down arrow to choose the reason.



The screenshot shows the 'Time Entry' screen for patient 'TABLET CATEPILLAR, Butterfly'. The visit is titled 'NURSING ASSESSMENT (TM129) (R1)'. The 'UNMADE VISIT' checkbox is checked and highlighted with an orange box. The 'VISIT TYPE' dropdown menu is also highlighted with an orange box and shows 'Nursing Assessment'. Other fields include 'TRAVEL TIME', 'DIRECT TIME', 'MILEAGE', 'INDIRECT TIME', 'BRANCH', 'NPI', 'CPT CODE', and 'CPT MODIFIER'.