December 8, 2022

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Netsmart Tablet

Frequently Asked Questions

Netsmart Mobile

➢ **Patient Visits are submitted, non-clinical activities will sync when all components have been completed.**

- Manually sync by selecting the sync icon (chasing arrows).

➢ **Cannot View Orders (485/Plan of Care) on the iPad.**

- Navigate to Documents >Active Orders to review Active Orders.

- ➢ **Tap Start Visit when you begin the visit and tap End Visit when you leave the visit to capture direct time.**
    - Use the indirect time field on time entry to indicate the indirect time for the patient visit.
    - Tapping start visit and end visit will also capture the start time of travel to your next visit.
        - Time and mileage will need to be entered for the first visit and cannot be entered until after the first visit is started.
        - Review the travel time and mileage on time entry and update as necessary before submitting.
        - If travel time and mileage are not appropriate, clear the time and enter 0 for mileage.
- ➢ **Today, Time Entry and Calendar will allow you to navigate 7 days back and 7 days forward unless there is data that did not sync for a patient.**
    - Activities can only be added for up to 48 hours after they occurred, contact your manager for assistance after that time.

Logging in

- ➢ **Maximum of 3 attempts to log in**
    - Username is not case sensitive.
    - Password is case sensitive.
    - After three attempts, you are locked out for 20 minutes.
        - After a second failed attempt, call the HelpDesk and have your password reset to utilize the password reset functionality on the iPad.
- ➢ **Tap Change Password on the sign in screen of Netsmart to change your password.**
    - If you have forgotten your password, you must call the HelpDesk at 207.973.7728.

Calendar

- ➢ **Add activities to the calendar without a start and end time.**
    - Navigate to time entry to enter the direct start and end time for an activity.
    - As a reminder, activities automatically syncs when you navigate off time entry when the direct time has passed.
- ➢ **Tap Day view on the calendar to see more details such as scheduling notes and the trash can icon to delete a visit.**
- ➢ **For salary employees, add hours worked for the actual hours worked and document on time entry, remembering to document any breaks.**
- ➢ **For differential pay, add the differential pay activity to document the activity on time entry.**
- ➢ **Add a Patient Appointment to the calendar by using the resource Patient Appointment.**

Documentation

➢ **If documentation was started before Start Visit was selected, follow the steps below to connect them to the visit.**

- Navigate to the following from Open Charts:
    - Assessments
        - Select the assessment started, then tap **…** (ellipsis) and select **Connect to Visit/Phone Call**.
    - Clinical Note
        - Select the appropriate note, then tap **Copy Note**.
        - Tap add new note and then tap in notes two times and select paste.
        - Document the remaining required elements.
        - Tap the previous clinical note that was copied and tap the trash can in the bottom right to delete.
    - Care Plan Charting
        - Go to **Open Charts** and click **Care Plan Charting** to document on this visit.

➢ **Adding a D/T summary to an Assessment**

- Navigate to the applicable assessment, tap the three dots, and tap **D/T Summary**.
- Select the appropriate visit type and tap Done.

➢ **Adding an OASIS Only Assessment**

- Locate the necessary patient visit and add a new assessment.
- Within the Assessment template drop down, select the **Oasis Only** template.

Tasking

➢ **Navigate to tasks to add a task for items such as:**

- Authorization for further visits from Insurer
    - Use the resource type Authorization, Insurance.
- Telehealth Referral
    - Use the Telehealth referral resource type as applicable.
- Live Safe Referral
    - Use the Live Safe resource type as applicable.
- Caring Calls

Important Reminders

Patient Visit

➢ Tap Start Visit when you begin the visit for the patient (direct time or documentation/patient call) and end visit when you complete the direct time or the time for the documentation/ patient call.

➢ If a visit has been started and ended and documentation is not completed and submitted, the application will not let you start another visit on that patient until you completed and submit the open visit; however, you can move on to see another patient.

➢ Navigate to Open Charts when finished with a visit, this will indicate if all documentation is complete to submit.

➢ Synchronize at the end of each visit and submit when completed at 100%.

➢ To search for a physician, you can use %%% as a wild card in most windows. The three percentage signs will list all physicians.

- If you type in the first letter of the physician's name followed by %% or first two letters of the physician's name followed by %, the application will pull up all physicians whose last name starts with the letter(s) you entered (i.e., A).

Host Mode Only

➢ Once the visit has been submitted, any modifications made to the Time Entry need to be done in Host.

➢ If using MediSpan, Drug to Drug Interaction Reports can only be run on new medications after they have been submitted to Host.

Time Entry

➢ Adding Differentials

- Tap ⊕ **Add** icon in the lower right.
- Tap **Activity**.
  - ▪ If adding more than one day, tap **Recurring** at top of screen.
- Complete required fields.
  - ▪ Resource Type, Activity, Start time ("at"), "every" and "for."
- Resource Type: choose your Discipline.
- Date: click the field to view calendar to change date if needed.
- Activity: scroll to the type of differential to add.
- Tap **Done** when complete.

Reset Cache (AKA Deleting Cache)

➢ **Tap the Settings icon on the home screen of the iPad.**

➢ **Scroll down in the Settings column (left side of screen). Select HomeCare.**

➢ **Under Instruments, locate Reset Cache. Slide the button to slide to the right and activate the cache reset.**

➢ **When the Netsmart App is opened, the Cache Reset notification will display. Click OK.**

➢ **When logging in to Netsmart, the cache will be cleared and the system will return Reset Cache to off.**

Connectivity

**What type of connection do we have?**

➢ **Cellular Service**

  • When in the office, your tablet may switch to Wi-Fi and should be set to **EMHSAccess**.

Can I use the patient's home Wi-Fi if not connection to cell service?

➢ **Yes, if the patient/family are willing to share their password.**

What if there is no cell service in my location?

➢ **If in an area where cell service is not always available, place the tablet in Airplane Mode before beginning the day.**

➢ **When offline not all tiles can be edited or opened**

  • 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.
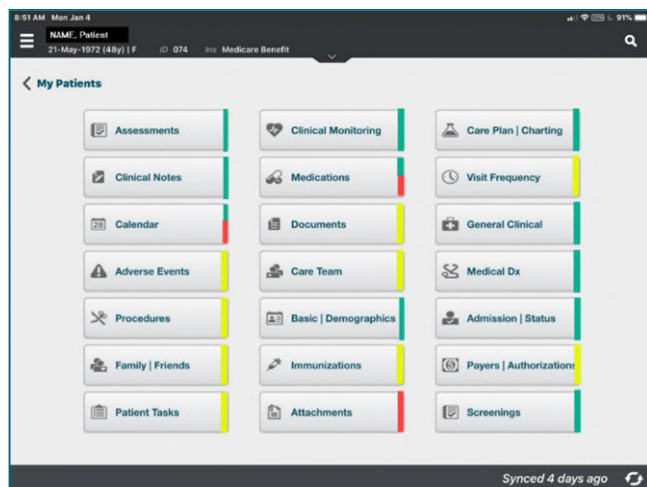
➢ **Before beginning the day, open the patient chart from Today.**

- Tap Assessment.

  ▪ Document a period in the other box or document a question on the assessment, this can be changed later.

  ▪ Tap the back arrow in the top left next to Assessment to save.

- When cellular service or Wi-Fi connection is available, inactivate **Airplane Mode**, complete the documentation, and submit.

- The following screens may have documentation entered in **Airplane Mode**; all others will need cell service to complete.

  ➢ **Clinical Monitoring**   ➢ **Care Plans and Compact charting**

  ➢ **Medications**   ➢ **Care team**

  ➢ **Clinical note**   ➢ **Basic**

➢ **If a new drug is added while offline, you are not able to perform a Drug-to-Drug Interaction because the Medication must be synchronized before the Drug-to-Drug Interaction option is available.**

➢ **If a visit is entered while online, you are not able to change the visit offline; however, you can enter a new visit offline.**

➢ **Care Plan charting is available offline; however, you must be connected to a visit in order to do charting.**

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

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