Netsmart Mobile Caregiver+ User Upload Instructions

Netsmart's Mobile Caregiver+ solution allows you to upload user (caregiver) information as follows.

Note: If you have a smaller number of users, then you may wish to enter them using the screens provided in the Mobile Caregiver+ provider portal.   If you have a larger number, then you may wish to use file upload.

The template that we provide is in comma-separated-value (CSV) format, you can edit it with either Microsoft Excel, Google Sheets, or a notepad application.

It is important that you follow the instructions below carefully, and that you do not change any of the fields/columns in the template.

USERS:

You can upload all your users at one time using the Netsmart EVV User Upload template.

1. Open the Excel linked above or use the **EVV information and resources** dropdown menu on the DMS EVV website at https://bit.ly/kywaiverEVVinfo to locate the **Netsmart EVV User Upload template** under **Provider Information**.

    Important This file includes one row of sample data as an example for you to follow. **Please remember to delete this row before uploading.**

2. Each column in the Excel file has specific rules about what is an acceptable entry, the rules are explained in more detail below.

3. Keep in mind, when you edit this template in Excel or Google Sheets, you **must save the file as .csv file before uploading**.

Column A – Users First Name

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

-   FirstName is a mandatory field.
-   FirstName allows for letters and spaces only (no numbers or special characters).
-   FirstName must be 255 characters in length or less.

Column B – Users Last Name

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						

Netsmart Mobile Caregiver+ User Upload Instructions

- LastName is a mandatory field.
- LastName allows for letters and spaces only (no numbers, spaces or special characters).
- LastName must be 255 characters in length or less.

Column C – UserName

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- UserName is a mandatory field.
- UserName allows for letters, numbers, and special characters.
- UserName must be 255 characters in length or less.
- UserName cannot be used by more than one-person in. Numbers or special characters must be used with each username (last 4 digits of phone, SS# or some other unique pattern).

Column D – Email

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Email is a conditional field. Either Email or Phone Number must be populated.
- Email must have an "@" and "."
- Email must be 255 characters in length or less.
- Example: Johndoe12!@gmail.com.

Column E – PhoneNumber

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Phone Number is a conditional field. Either Email or Phone Number must be populated.
- Phone Number must contain only numbers.
- Phone Number must be 10 numeric characters in length.

Netsmart Mobile Caregiver+ User Upload Instructions

Column F – Users IvrPin

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- IvrPin is an optional field.
- IvrPin allows for numbers only, (no spaces, or special characters).
- IvrPin must be 7 numeric characters in length.

Column G – Users MedicaidID

	A	B	C	D	E	F	G
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897
3							
4							

- MedicaidID is an optional field.
- MedicaidID must be 9 - 13 digits in length, and allows for numbers and letters only, (no spaces, or special characters).
- There should not be any spaces BEFORE the MedicaidID number starts, for example: "123456789" is valid, and " 123456789" is *not* valid because there is a space before the "1".
- If MedicaidID starts with zero, add letter "M" in front to keep leading Zero. Some applications remove zero after saving as .CSV, Our application will remove letter "M" after import is successful.

Column H – UserRole

B	C	D	E	F	G	H	
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	

- UserRole is a mandatory field.
- UserRole may **only** contain the specific 4 letter code for the following:
  - PRAD (Provider Administrator).
  - CARE (Caregiver) *note mobile login only.
  - PMON (Provider Monitor) *note Admin permission with read only access.

Netsmart Mobile Caregiver+ User Upload Instructions

Column I – UserStatus

B	C	D	E	F	G	H	I
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE

- UserStatus is a mandatory field.
- UserStatus may **only** contain the specific values as follows:
    - ACTIVE (Can login)
    - INACTIVE (Not allowed to login)

Column J – CaregiverType

C	D	E	F	G	H	I	J
UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus	CaregiverType
Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE	RNS

- CaregiverType is a mandatory field.
- CaregiverType may **only** contains the specific 3-4 letter code for the following:
    - CNA (Certified Nursing Assistant)
    - LPN (Licensed Practical Nurse)
    - RNS (Registered Nurse)
    - ABA (Assistant Behavior Analyst)
    - RBT (Registered Behavior Technician)
    - LA (Lead Analyst)
    - OTHR (Other)

Now that you have entered the information for your users into the template, you are ready to load your user into the Mobile Caregiver+ provider portal by following the below steps. **Please note that you will not have access to the Mobile Caregiver+ provider portal until you register to use Mobile Caregiver+**

1. Make sure you have deleted the sample row from the users list you just finished creating
2. Make sure you have saved the document as a .csv file
3. Go to https://4tellus.com/ and click the login button in the upper-right corner of your screen, it will look like this:

EVV LOGIN

Netsmart Mobile Caregiver+ User Upload Instructions

4. You will be navigated to the Login Screen, it will look like this:

5. Navigate to the menu on the left side of the screen and select 'Users'

Issued: 10/29/20
Updated: 08/01/21
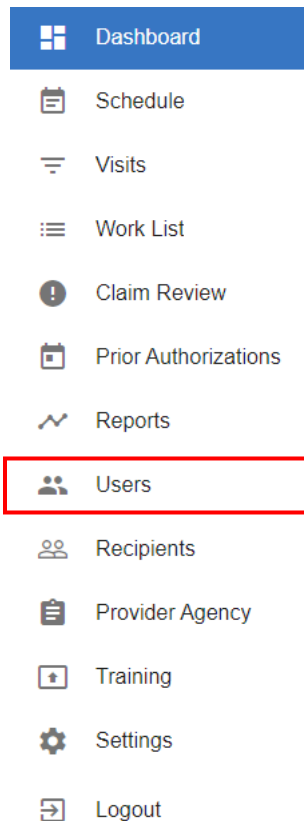
Netsmart Mobile Caregiver+ User Upload Instructions

6. In the upper right-hand corner, click on the cloud with the up arrow:
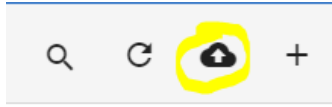
7. A screen will pop-up asking you to locate the .csv file on your computer, once located, click it
8. The upload process will begin once the file is selected
9. Upon successful upload, a small green box in the bottom right-hand of your screen will quickly show, saying 'Success'
    - Your screen will also update and you should see your Users populated below the headers:

10. If any errors are identified, a message containing the exact row(s) and column(s) of the error will be shown on your screen.
    - Please refer back to the guide above in order to troubleshoot the exact error(s)

IMPORTANT: If there are any errors detected by the system, no records from your file will upload, the entire file must be error free before any user records will upload.