From the Office of Health Informatics

Northern Light Health

Netsmart

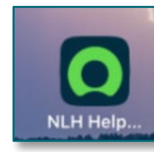
Frequently Asked Questions

May 11, 2026

Health Informatics Assistance

Health Informatics Educational information

- Access flyers, memos, and other documentation information on the Health Informatics Education Portal.
    - Health Informatics Education



- To request assistance, submit a Help Desk ticket:
    - Tap the Edge icon then NLH Help.
        - Self-Service Portal I need EHR assistance - Welcome to the NLH Service Portal
    - Call the Help Desk 207-973-7728 if affecting patient care

Frequently asked questions

Cannot edit Visit Frequency screen

- If unable to edit the Visit Frequency screen, check the top left corner.
    - If **Prospect** shows instead of the certification period date range, assure the patient status has been updated to **Admit**, and the chart has been synched from the Tile screen.
    - If it still says **Prospect**, submit a Help Desk ticket to asking for it to be fixed.

Need to reset cache before documentation is submitted

- If resetting the cache due to a Netsmart issue and have unsubmitted documentation under Open Charts, change the Visit type to **Documentation Patient Call** then submit.
- Ask your manager to change the visit type back to the original.

Visit was moved to a new date then when Start Visit was tapped, the system moved the visit back to the original date.

- Submit a Help Desk ticket as this requires 1:1 assistance.

Clinical Note shows 0% on Open charts and shows as complete in chart

- In Open Charts, tap **Clinical Note,** then tap the note in the left column.
- Tap **Copy Note** in the lower right and select **OK** to copy note.
- Tap **+** to add a new note, tap in the note box to paste the original note.
- Add the **Use Code** and edit the date to the date of the visit if applicable.
    - Add a * to the beginning of the new note to differentiate it from the original note.
- Tap the arrow in the top left to save; then tap the **Clinical Note** tile.
- Tap the original note; then swipe up on the screen to tap the **trash can** icon in the lower right to delete it.

Care Plan Charting shows 0% on Open charts and shows as complete in chart

- In Open Charts, tap **Care Plan/Charting**. Tap **Care Plan Editing tab at bottom of screen.** Add one new Intervention and chart. Add an end date if the Intervention is not needed for future visits.

Correct Assessment template is not available

- If choices are **Bereavement**, **Spiritual**, **Supervision**, or **Psychiatric Nursing** only, change **Visit Type** on Time Entry screen to **Documentation Patient Call**.
- On Today screen, use magnifying glass icon in top right to search for patient and open chart.
  - Tap **Assessments** tile to complete the assessment, then submit on Time Entry.
- Ask manager or someone with Host access to change the visit type back to the original type.

Visit is Cancelled/Refused

- If visit is cancelled before traveling to the patient, remove Direct Start and End time (if present) on Time Entry then tap **Unmade** box.
  - If the time cannot be removed, ask manager or someone with Host access remove.
- If visit is cancelled or refused after traveling to patient, change **Visit Type** on Time Entry to **Patient Refused with visit.** This allows documenting time and miles. Add a clinical note in the chart to submit.

If documentation was started before Start Visit was selected, follow steps below to connect 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 then tap in notes box twice. Select **Paste**.
    - Document the remaining required elements.
    - Tap the previous clinical note that was copied; then 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 on the Today screen.
    - Tap the visit type then add a new assessment.
        - Within the Assessment template dropdown, select the **Oasis Only** template.
- If the visit is more than seven days ago, tap the magnifying glass icon to search for and open the patient chart.
    - Add a new assessment.
        - Fill in the information in the template box. For the date, tap it; then tap it again in the white box. This will open the calendar to allow a date to be chosen.

HOPE visits

Documentation

- All HOPE Assessments (Admission, SFV, HUV1 and HUV2) must be connected to a visit which has been started.
- SFV, HUV1 and HUV2 Assessment template should auto populate the Associated visit at the end of the template box.
- If a HOPE visit is added with a date that does not follow the CMS guidelines, a message appears at the end of the Assessment template box.
- If a patient/family refuses a SFV visit and it cannot be rescheduled within the 2-day window, use the **No Symptom Follow-up Visit** Clinical Note template to document why the visit was not made.

Important Reminders

Patient Visits

- 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 started and ended and the documentation is not completed, the application will not let you start another visit on that patient until you complete the open visit. 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).
- Once the visit has been submitted, any modifications made to the Time Entry need to be made in Host.
- If adding a medication to a patient chart, sync before running the Drug-to-Drug Interaction Report.