

When an Assessment template is opened, it defaults to the current date or date of the visit. There may be times when the date needs to be edited.

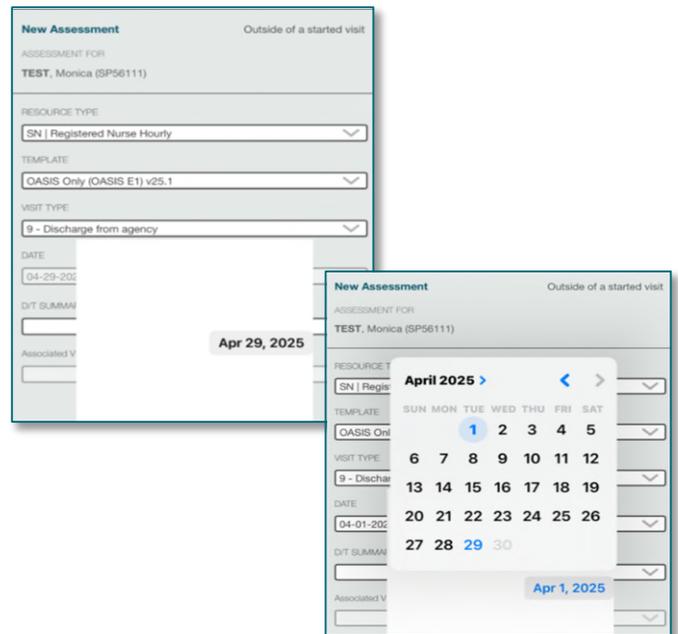
### Opening the Assessment

- Visit less than one week ago
  - On the **Today** screen, change the date at the top then open the visit.
  - The date will auto populate to the date of the visit so the assessment can be added and submitted.
- Visit more than one week ago
  - Use the magnifying glass icon in the top right to search for the patient.
  - Open the chart then follow the steps below.

**NOTE:** Remember to Sync the chart to pull the latest patient information in to view

### Open the Assessment Template

- STEP 1:** Tap **Assessment** tile.
- STEP 2:** Tap **+Add**.
- STEP 3:** Tap **date** under Date.
- STEP 4:** Tap the **date** in the white box.
- STEP 5:** Tap the **date** of the original visit.
- STEP 6:** Enter **Resource Type** if blank.
- STEP 7:** Enter the **Template** type.
- STEP 8:** Enter the **Visit Type**.
- STEP 9:** Tap **Done** to open Assessment.



The image shows two screenshots of the 'New Assessment' form. The left screenshot shows the form with a date picker set to April 29, 2025. The right screenshot shows the form with a date picker set to April 1, 2025. The form includes fields for Assessment For (TEST, Monica (SP56111)), Resource Type (SN | Registered Nurse Hourly), Template (OASIS Only (OASIS E1) v25.1), Visit Type (9 - Discharge from agency), and Date (04-29-2025). The right screenshot also shows a calendar view for April 2025 with the date 1 selected.

### Add Documentation time

- STEP 1:** Add a **Documentation / Patient Call** visit.
- STEP 2:** Add **Clinical Note** stating assessment was added for (visit date).
- STEP 3:** Edit **Start** and **End** time on Time Entry to time spent documenting assessment.
- STEP 4:** Submit visit on **Time Entry** screen to upload assessment and time.

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.