From the Office of Health Informatics

Home Care and Hospice Adding Date to Assessment Documented After Visit

April 28, 2025

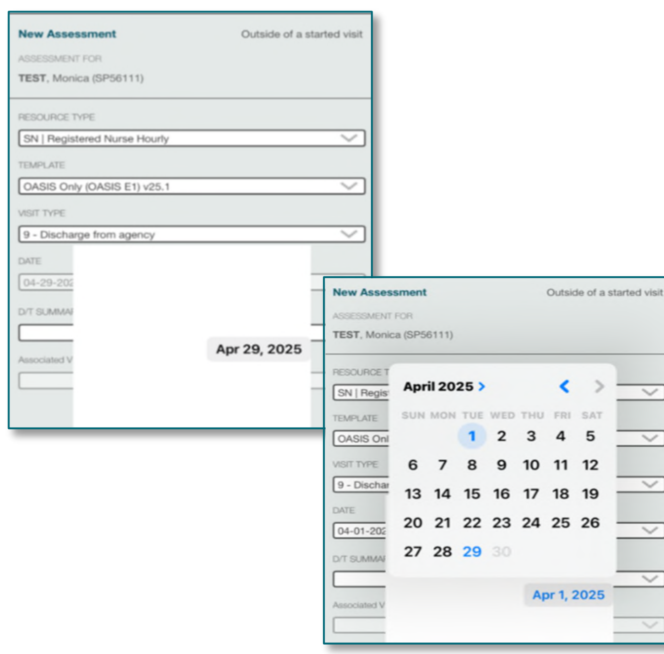
When an Assessment template is opened, it defaults to the current date or date of the visit. There may be times when the date needs to be edited.

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.

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 or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.