Northern Light Health

From the Office of Clinical Informatics

Home Care and Hospice
Netsmart – Reserving and Editing an Assessment

July 16, 2024

If a completed assessment needs to be edited, it first needs to be reserved. Edits may then be made and assessment needs to be submitted again.

Opening the chart

STEP 1: **My Patients:** tap the patient's name or use the magnifying glass to search for the patient then open the chart.

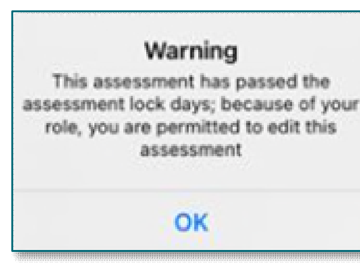
STEP 2: **Sync** the chart. 

Open and reserve the Assessment for editing

STEP 1: Tap **Assessment** tile.

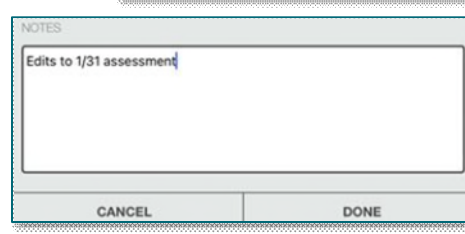
STEP 2: Tap the Assessment to edit in the left side column.

STEP 3: Tap **Reserve Assessment** in the lower right.



STEP 4: A warning may appear: **This assessment has passed the assessment lock days: because of your role, you are permitted to edit this assessment.** Tap OK.

STEP 5: **Notes** box: enter **edit assessment (date of assessment)** then tap **Done**.



STEP 6: Enter the edits to assessment.

STEP 7: Tap arrow in the top left.

- Enter Netsmart password.
- Tap arrow at the top left to save edits.

Submit the Edited Assessment

STEP 1: Open **Time Entry**.

STEP 2: Update the date at the top of the screen to date of Assessment (original visit).

STEP 3: **Submit** assessment.

- This step should automatically remove the reservation of the assessment.