From the Office of Clinical Informatics

Quick Reference Guide (QRG)

Netsmart – Document an Assessment

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This Quick Reference Guide (QRG) reviews documenting an assessment in Netsmart

Common Buttons & Icons

	Main Menu icon
Add	**Add** button
	Ellipsis icon
	Back Arrow icon

Document an Assessment for an Open Chart

➢ From the Today Screen in Netsmart

STEP 1: Tap the **Main Menu** icon; then tap **Open Charts**. The Open Charts screen appears.

STEP 2: Tap your patient's name, if needed.

STEP 3: Tap **Assessment**. The Assessment screen opens.

STEP 4: Tap the **Add** button located at the bottom-right.

STEP 5: Fill out the New Assessment window's fields as appropriate.

NOTE: The Resource Type and Date fields automatically populate and cannot be changed.

NOTE: You need to make a D/T Summary selection when documenting an assessment for discharge or transfer.

STEP 6: Tap **DONE**. The assessment form opens.

NOTE: The list on the left displays in sections that require documentation.

NOTE: A section's required items are outlined in orange in the right-hand pane.

STEP 7: Complete each required section.

NOTE: Consider the following when completing the assessment sections:

a) The pill shaped icons beside each Assessment section represent their completion status. When a section has not been started, its pill appears gray. When a section has been partially completed, it displays as half green. Finally, when a section is complete, its pill is fully green.
b) A general progress bar appears at the bottom of the list. Once the progress bar is filled in fully, you have completed all of the required sections in the assessment.
c) Most sections include an arrow to the right of their title. This indicates that the section contains at least one subsection.

d) **Within a subsection, tap the Back Arrow icon to save your documentation and return to the full assessment.**

e) **You can add sections that are not included in the current assessment template if needed. For detailed instructions, refer to the following subsection titled "Manually Add Sections to an Assessment".**

STEP 8: When you are viewing the full assessment, tap the **Back Arrow** icon at the top left of the screen to save the documentation.

STEP 9: Tap the **Back Arrow** icon once again to return to the Open Charts screen.

STEP 10: Verify that your patient's Assessment section displays as **100%**.

Manually Add Sections to an Assessment:

If a section you would like to document is not included in the assessment template you chose, you can manually add it. Follow these steps to add sections.

- From the Assessment screen:

STEP 1: Tap the **Ellipsis** icon at the bottom-right of the screen; then tap **Show Details**. All inactive assessment sections appear in the section list.

STEP 2: Tap the appropriate section in the list.

NOTE: **You may need to tap its subsections until you reach the end of its section hierarchy. You can activate the section (Step 3) once the main pane changes from the previously selected section to a grayed-out version of the inactive section.**

STEP 3: Tap the **Ellipsis** icon once again; then tap **Activate**.

STEP 4: Tap **For this assessment only**.

STEP 5: Repeat steps 2-4 as needed for any additional sections.

STEP 6: Tap the **Ellipsis** icon once again; then tap **Hide Details** to hide the inactive sections in the list.