
When an Assessment template is opened in a chart, it defaults to the current date. There may be times when the date needs to be changed to the correct date.

Opening the Chart

- **Today:** If visit is **less than one week ago**, change the date at the top then open the visit.
- **My Patients:** If the visit was **greater than one week ago** or it is an **administrative discharge due to a Payer change**, use the magnifying glass to search for the patient then open the chart.

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 your **Resource Type**.
- STEP 7:** Enter the **Template** type.
- STEP 8:** Enter the **Visit Type**.
- STEP 9:** Enter **D/T Summary**, if a Discharge or Transfer.
- STEP 10:** Tap **Done**.

