From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Netsmart – Open Charts: Finish Visit Documentation

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This Quick Reference Guide (QRG) reviews the steps to check the Open Charts screen for incomplete patient documentation in Netsmart.

Common Buttons & Icons

☰	**Main Menu** icon
<	**Back Arrow** icon
⊕	**Add** icon

Finish Incomplete Visit Documentation

➢ From the Today screen:

STEP 1: Tap the **Main Menu** icon.

STEP 2: Tap **Open Charts**.

NOTE: **The number that appears beside Open Charts indicates how many open charts exist. If no number appears, then all of your patients' visit documentation is complete.**

STEP 3: Tap your patient's name in the lefthand list of the Open Charts screen, if needed.

STEP 4: Tap an incomplete documentation section in the righthand pane.

STEP 5: Complete the section's missing documentation.

STEP 6: Tap the **Back Arrow** icon within the section until you return to the Open Charts screen.

STEP 7: Tap your patient's name in the lefthand list once again, if needed.

STEP 8: Confirm that you completed the section by viewing its completion percentage.

STEP 9: Repeat steps 4-8 until you complete all of the documentation items for the patient.

STEP 10: Repeat steps 3-9 for any other patients with incomplete documentation.

NOTE: **Consider the following when completing incomplete documentation.**

- **Assessments: If your patient does not have an assessment started already, you need to create a new one by tapping Add at the bottom-right of the screen. Otherwise, if your patient has any incomplete assessments, you need to complete them.**
- **Clinical Note: To create a Clinical Note, tap the Add icon at the bottom-right of the screen; then compose the note and enter its details.**
- **Care Plan | Charting: Complete all required sections for any incomplete Care Plans.**