From the Office of Clinical Informatics

Quick Reference Guide (QRG)

Netsmart – Open Charts: Attach Documentation to a Visit

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This Quick Reference Guide (QRG) reviews how to attach documentation to a visit in Netsmart.

Common Buttons & Icons

	Main Menu icon
	Back Arrow icon
	Add icon
	Ellipsis icon
	Delete icon

Open Charts: Attach Documentation to a Visit

Attach Documentation to a Visit

- Within Netsmart:

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

STEP 2: Tap the appropriate patient's name in the lefthand list, if needed.

STEP 3: Tap a documentation item that you have completed outside of the visit.

STEP 4: Attach the documentation to the visit.

NOTE: **Refer to the following subsections for guidelines on attaching documentation.**

STEP 5: Repeat steps 2-4 for any other unattached documentation items.

Attach Assessment Documentation

- From your patient's Assessments screen:

STEP 1: Tap the assessment in question in the lefthand list on the Assessments screen.

STEP 2: Tap the **Ellipsis** at the bottom-right of the screen; then tap **Connect to Visit/Phone call**. The Select Service window appears.

STEP 3: Tap the appropriate visit.

STEP 4: Tap **DONE**.

NOTE: **You can verify that the assessment has been attached to the visit by viewing the date which appears to the right of the Assessment list's title.**

STEP 5: Tap the **Back Arrow** icon until you return to the Open Charts screen.

Fix Incorrect Care Plan | Charting Progress Indicator

Even if you successfully enter a patient's Care Plan Charting documentation during their visit, the system may incorrectly show a 0% completion status. To fix this, follow these steps.

- From your patient's Care Plan | Charting screen:

STEP 1: Tap a Care Plan that you documented on during the visit in the lefthand list.

STEP 2: Change one of its existing values; then change it back to the original value.

NOTE: **For example, in a Lab Care Plan, you can change one of the Goals' Progression selections from Positive to Negative. Then, change it back to Positive.**

STEP 3: Tap the **Back Arrow** icon.

Attach Clinical Note Documentation

- From your patient's Clinical Note screen:

STEP 1: Tap All at the bottom of the lefthand list.

STEP 2: Tap the unattached note.

STEP 3: Tap Copy Note near the bottom-right of the screen.

STEP 4: Tap OK in the pop-up.

STEP 5: Tap the Add icon near the bottom-right of the screen. A blank note appears.

STEP 6: Tap the blank note's NOTE field.

STEP 7: Tap the blank note's NOTE field again to display the text options.

STEP 8: Tap Paste.

STEP 9: Add the same information that was documented in the unattached note, including the Use Code, and Ordering Physician.

STEP 10: Tap the unattached note in **the lefthand list.**

STEP 11: Tap the Delete icon.

STEP 12: Tap Delete in the pop-up.

STEP 13: Tap the Back Arrow icon.