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Adding and Editing Encounter Questions

Editing an Encounter System

The Encounter Questions window is where you build custom descriptions and questions to add to the Exam and Review of Systems. This will then allow you to add these global questions to templates. If adding questions to an Encounter group you will need to add the question(s) to the appropriate templates in the Encounter Templates Editor or Well Visit Templates Editor.

1. Navigate to Encounter Questions (Exam, ROS, History): **Clinical tab > More button (Customize group) > Encounter Questions**.
2. Click the **Groups** drop-down to select the group you want to edit.
3. To edit a group system.
   a. Select the system in the top panel of the window.
   b. Click the **Edit** button .
   c. In the top part of the window, you can edit the Description, Sort Order, and select the checkbox in the Retired field.
      Note: If you want to change the meaning of the System and associated questions it is recommended you retire the system and create a new system and questions.
   d. Click the **Save** button .

Editing an Encounter System Question

1. To edit the questions in the systems.
   a. Select the system in the top panel of the window.
   b. Click the question you would like to edit in the bottom panel.
   c. You can edit the following information.
      ● **Question**: Click into the question field and modify the question.
         Note: If you want to change the meaning of the question it is recommended you retire the question and

create a new question.

- **Sort Order**: Click into the Sort Order field and type a number. Each question must have a unique number for the sort order.
- **Scope**: Click the drop-down and select from the list.
- **Sex**: Click the drop-down and select from the list.
- (*Optional*) **SNOMED Description and code**:
  i. Begin typing or click the drop-down and enter a description.
  ii. Select from the list.

2. Click the **Save** button.

Adding an Encounter System

1. Select the system in the top panel of the window.

2. Click the **Add** button ⊞.

3. Complete the following information.
   - **Description**: Enter the name of the system.
   - **Sort Order**: Type the number in the Sort Order where the system should display. Sort order must be a unique number.
   - **Section**: Click the drop-down and select the group the system is associated with.
   - **Exam Type**: Will default to Multi-System. Click the drop-down if the practice has different exam types.

4. Click the **Save** button.

Adding an Encounter Question

1. Select the system in the top panel of the window.

2. From the Questions panel, click the **Add** button.

3. Complete the following information.
   - **Question**: Click into the question field and add the question.
   - **Sort Order**: Click into the Sort Order field and type a number. Each question must have a unique number for the sort order.
   - **Scope**: Click the drop-down and select from the list.
   - **Sex**: Click the drop-down and select from the list.
   - (*Optional*) **SNOMED Description and code**:
     a. Begin typing or click the drop-down and enter a description.
     b. Select from the list.

4. Click the **Save** button.

Retire a System Question

1. Select the system in the top panel.

2. Click the question to retire in the **Questions** panel.

3. Click the **Retire** button.

4. Click **OK** to the warning to mark the selected question as retired.

5. The Audit Trail window displays, click the drop-down and select a reason.

6. Click **OK**.

Using Copy Template

You can create a template using the Copy Template feature.

1. Navigate to the Encounter Template Editor or Well Visit Template Editor: **Clinical tab > Encounter Templates or Well Visit Templates**.

2. Click the **Add** button.

3. Add the template properties.

    a. **Template:** Name given to a template.

    b. *(Optional)* **Appointment Type:** Selection of a default appointment type.

    c. **Category:** Method of organizing like templates.

    d. **Visibility:** Ability to restrict who can view the selected template.

    e. *(Optional)* **Author:** Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.

    f. **Location:** View the template at a specific location, leave blank to allow all locations.

    g. **Finalize Status:** Selection of who may finalize the template. Most templates will be set to Providers only.

    h. *(Optional)* **Default Place of Service**: This field can be used with templates that are non-office such as Telehealth to automatically populate the Place of service on the Visit Information tab of an encounter note.

4. Copy the Encounter Note tab information.

    a. In the **Copy from template** field, type the name of the existing template you would like to copy from.

    b. Press the Enter key to choose the template.

    c. Click **OK** to copy the notes from the existing template.

a. The new template has been populated with the values from the existing one. You can now edit or add to the fields that are there to apply them to the new template.

b. *(Optional)* Add a diagnosis code.

    i. Click the **Add** button.

    ii. Click into the **ICD10 Description** field and click the **Search** button .

    iii. Enter a description or code into the **ICD10 Code/Description** field.

    iv. Select the diagnosis code.

    v. Click into the **SNOMED description** field, begin typing the description and click the **Search** button.

    vi. Select the SNOMED code.

    vii. *(Optional)* Click the drop-down in the **Problem Status** field and select from the list.

    viii. Click the **Save** button.

5. Copy the Detailed ROS section.

    a. Click the **Detailed ROS** tab.

    b. In the **Copy from template** field, type the name of the existing template you would like to copy from.

    c. Press the Enter key to choose the template.

    d. Click **OK** to copy the detailed ROS from the existing template.

6. Copy the Detailed Exam section.

    a. Click the **Detailed Exam** tab.

    b. In the **Copy from template** field, type the name of the existing template you would like to copy from.

    c. Press the Enter key to choose the template.

    d. Click **OK** to copy the detailed exam from the existing template.

7. Orders cannot be copied from another template. Navigate to the **Orders** tab to add any needed orders.

8. Click the **Save** button.

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Save as Template

You can use the Save as Template feature on the visit note to create a new template if there are templates that you commonly use together or you have charted a new symptom or diagnosis.

1. Within the Summary of a patient Encounter or Well Visit, click the **Save Template** button.

2. Add the name of the template in the **Template name** field.

3. Select the **System category** by clicking the drop-down and selecting the category.

4. In the **Include the following sections**, click the checkbox for the sections you would like to include.

5. Click **OK**.

6. To edit the template, do the following.

   a. Navigate to Encounter Templates or Well Visit Templates: **Clinical tab > Encounter Templates or Well Visit Templates.**

   b. Select the template added and click the **Edit** button.

   c. *(Optional)* Remove the **Author** by clicking the **Clear** button.

   Note: When saving a template, the user saving is automatically assigned as the Author. If assigned as an Author that user will be the only person permitted to change the template.

   d. Remove any patient-specific answers or documentation.

   e. Make any other changes necessary to customize the template, such as adding Orders.

   f. Click the **Save** button.

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