Managing Templates QRG

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Update Encounter Templates

Update a Symptom Encounter Template

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **+** to expand the **System: Symptoms** group.
3. Select a template and click the **Edit** button or double-click to open it.
4. At the top of the window, you can edit the listed template properties.
   - **Template:** Name given to a template.
   - *(Optional)* **Appointment Type:** Selection of a default appointment type.
   - **Category:** Method of organizing like templates.
   - **Visibility:** Ability to restrict who can view the selected template.
   - *(Optional)* **Author:** Assignment of a template to a specific user. Templates assigned to an author may only be edited by that user.
   - **Location:** View the template at a specific location; leave it blank to allow all locations.
   - **Finalize Status:** Selection of who may finalize the template. Most templates will be set to Providers only.
   - *(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.
5. Click on each tab to update the template according to your practice's needs.
   - **Encounter Note**: You can edit the text in each field.
     Note: Typically a symptom template will have the CC and HPI complete.
   - **Detailed ROS**: This shows the questions that are currently viewable for the selected Encounter Template.
     a. Click on the **Show all groups** checkbox to view all available groups.
     b. Expand the section you would like to edit by clicking the **+ sign** next to the group.
     c. Add questions by clicking the N/A in the Rpt/Deny column to set a value of Pert, Reports or Denies.
     d. Remove questions by clicking on the value in the Rpt/Deny column until it reads N/A.

- **Orders/Workflow**: In this tab, you can navigate to the following tabs and edit Medications, Diagnostic Tests, Immunizations, Resources, Surveys, Followup, Other tasks. *(Optional)* For each tab, you can:
    a. Add an order to the listed tabs by clicking the **Add** button .
    b. Click the drop-down arrow or begin typing in the field and select from the list.
    c. Click the drop-down arrow and select a **Department**.
    d. Click the drop-down arrow and select a **Usage**.
    e. Delete an item on the tab by selecting it and clicking the **Delete** button .
    f. When finished click the **Save** button .

6. Click the **Save** button.

Update a Diagnosis Template

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **+** to expand the **System** group.
3. Select a template and click the **Edit** button or double-click to open it.
4. At the top of the window, you can edit the listed template properties.
    - **Template:** Name given to a template.
    - *(Optional)* **Appointment Type:** Selection of a default appointment type.
    - **Category:** Method of organizing like templates.
    - **Visibility:** Ability to restrict who can view the selected template.
    - *(Optional)* **Author:** Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.
    - **Location:** View the template at a specific location, leave blank to allow all locations.
    - **Finalize Status:** Selection of who may finalize the template. Most templates will be set to Providers only.
    - *(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.
5. Click on each tab to update the template according to your practice's needs.
    - **Encounter Note:** Review or edit the information below.
        - *(Optional)* **Counseling**: Counseling that is commonly done during the visit.
        - *(Optional)* **Coordination of Care**: Activities between two or more participants (including the patient) involved in a patient's care to facilitate the appropriate delivery of health care services.
        - *(Optional)* **Assessment**: The likely diagnosis or additional diagnoses that need to be ruled out.
        - **Plan**: This describes what will be done to treat the patient. This should address what was discussed or advised with the patient as well as timings for further review or follow-up are generally included.
        - **Instructions**: A summary of the visit written for understanding by the reader. Visible on the Patient Exist Note.
        - **Diagnoses**:
            a. Click the **Edit** button to edit a diagnosis code or the **Add** button to add a new one.
            b. *(Optional)* **Problem Status**: Confirm or select from the drop-down.
    - **Detailed Exam**: This shows the items that are currently viewable on the Encounter Template.
        a. Click on the **Show all groups** checkbox to view all available groups.
        b. Expand the section you would like to edit by clicking the **+ sign** next to the group.

    c. Add questions by clicking the N/A in the NL/ABNL column to set a value of NL, ABNL, or Pert
    d. Remove questions by clicking on the value in the NL/ABNL column until it reads N/A.
- *(Optional)* **Orders/Workflow**: You can navigate to the following tabs and edit Medications, Diagnostic Tests, Immunizations, Resources, Surveys, Followup, Other tasks.
    a. Add an order to the listed tabs by clicking the **Add** button.
    b. Click the drop-down arrow or begin typing in the field and select from the list.
    c. Click the drop-down arrow and select a **Department**.
    d. Click the drop-down arrow and select a **Usage**.
    e. Delete an item on the tab by selecting it and clicking the **Delete** button.
    f. When finished click the **Save** button.
- *(Optional)* **Procedures:** You can add procedure codes to a template to capture charges performed by procedures done in the office.
    a. Select a procedure category from the **Category** list.
    b. Double-click a procedure from the category. If the procedure code is not found, click the **Lookup CPT** button.
    c. Complete the procedure line.
    d. When finished, click the **Save** button.

6. Click the **Save** button.

Validate DX Codes

It's recommended to validate your Encounter Template DX Codes annually (close to but after October 1st) to ensure that the DX Codes you have on your templates are valid and specific.

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **Validate DX** button.
3. Review the confirm pop-up and click **OK** when you're ready to continue with running the validation. A validation progress bar is displayed on-screen giving you the opportunity to acknowledge each insufficient code found in your templates.
4. When validation is complete, revisit the identified templates and update the DX Codes to be appropriately coded for specificity.

Archive a Template

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **+** to expand the **System** group.
3. Open the template to update by double-clicking it or selecting it and clicking the **Edit** button.
4. Click the **Edit** button to make changes.
5. Under Finalize Status, select the **None (archived)** radio button.
6. Click the **Save** button.

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Create an Encounter Template

Create an Encounter Template: Symptom

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **Add** button to create a new template.
   Note: It is recommended you expand the System: Symptom group to ensure you do not duplicate a template.
3. Add the template properties.
   - **Template:** Name given to a template.
   - *(Optional)* **Appointment Type:** Selection of a default appointment type.
   - **Category:** Method of organizing like templates.
   - **Visibility:** Ability to restrict who can view the selected template.
   - *(Optional)* **Author:** Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.
   - **Location:** View the template at a specific location, leave blank to allow all locations.
   - **Finalize Status:** Selection of who may finalize the template. Most templates will be set to Providers only.
   - *(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. Click the **Encounter Note** tab if not already selected.
5. Enter a complaint in the **CC** field or use the **Phrase Construction** button to insert phrases.
6. Enter the history of the complaint in the **HPI** field or click the **Phrase Construction** button to insert phrases.
7. Click the **Detailed ROS** tab.
8. Expand the section you would like to edit by clicking the plus sign next to the group.
   Note: You may select the checkbox **Show all groups** to see all Review of System groups.
9. Add questions by clicking the N/A in the Rpt/Deny column to set a value of Pert, Reports or Denies.
   - Click once for Reports: Positive for the symptom/question.
   - Click twice for Denies: Denies the symptom/question.
   - Click three times for Pert: Relevant symptom/question to display when the template is created.
   - Click four times for N/A: Not applicable for the template. Removes from the group list.
10. *(Optional)* **Orders/Workflow**: You can navigate to the following tabs and add Medications, Diagnostic Tests, Immunizations, Resources, Surveys, Followup, Other tasks.
    a. Add an order to the listed tabs by clicking the **Add** button.
    b. Click the drop-down arrow or begin typing in the field and select from the list.
    c. Click the drop-down arrow and select a **Department**.
    d. Click the drop-down arrow and select a **Usage**.
    e. When finished click the **Save** button.
11. *(Optional)* **Procedures:** You can add procedure codes to a template to capture charges performed by procedures done in the office.
    a. Select a procedure category from the **Category** list.
    b. Double-click a procedure from the category. If the procedure code is not found, click the **Lookup CPT** button.
    c. Complete the procedure line.
    d. When finished, click the **Save** button.
12. Click the **Save** button.

Create an Encounter Template: Diagnosis

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **Add** button to create a new template.
   Note: It is recommended you expand the System: Symptom group to ensure you do not duplicate a template.
3. Add the template properties.
   - **Template:** Name given to a template.
   - *(Optional)* **Appointment Type:** Selection of a default appointment type.
   - **Category:** Method of organizing like templates.
   - **Visibility:** Ability to restrict who can view the selected template.
   - *(Optional)* **Author:** Assign the template to a specific user. Templates assigned to an author may only be edited by that user.
   - **Location:** View the template at a specific location; leave it blank to allow all locations.
   - **Finalize Status:** Selection of who may finalize the template. Most templates will be set to Providers only.
   - *(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. Click the **Encounter Note** tab if not already selected.
5. Complete the fields of the Encounter Note tab.
   - *(Optional)* **Counseling**: Counseling that is commonly done during the visit.
   - *(Optional)* **Coordination of Care**: Activities between two or more participants (including the patient) involved in a patient's care to facilitate the appropriate delivery of health care services.
   - *(Optional)* **Assessment**: The likely diagnosis or additional diagnoses that need to be ruled out.
   - **Plan**: This describes what will be done to treat the patient. This should address what was discussed or advised with the patient as well as timings for further review or follow-up are generally included.
   - **Instructions**: A summary of the visit written for understanding by the reader. Visible on the Patient Exist Note.
   - **Diagnoses**:
     a. Click the **Add** button.
     b. Click into the ICD10 Description field and click the **DX Search** button.
     c. Enter a description or code into the **ICD10 Code/Description** field.
     d. Select the diagnosis code.
     e. Click into the **SNOMED description** field, begin typing the description and click the **Search** button.
     f. Select the SNOMED code.
     g. *(Optional)* Click the drop-down in the **Problem Status** field and select from the list.
     h. Click the **Save** button.
6. Click the **Detailed Exam** tab.
7. Enter the exam points.
   Note: Click on the Show all groups checkbox to view all available groups.
   - Click once for ABNL: Positive for the finding.
   - Click twice for NL: Negative for the finding.
   - Click three times for Pert: Relevant symptom/question to display when the template is opened.
   - Click four times for N/A: Not applicable for the template. Removes from the group list.
8. *(Optional)* **Orders/Workflow**: You can navigate to the following tabs and edit Medications, Diagnostic Tests, Immunizations, Resources, Surveys, Followup, Other tasks.

a. Add an order to the listed tabs by clicking the **Add** button.
b. Click the drop-down arrow or begin typing in the field and select from the list.
c. Click the drop-down arrow and select a **Department**.
d. Click the drop-down arrow and select a **Usage**.
e. Delete an item on the tab by selecting it and clicking the **Delete** button.
f. When finished click the **Save** button.

9. *(Optional)* **Procedures:** You can add procedure codes to a template to capture charges performed by procedures done in the office.
   - Select a procedure category from the **Category** list.
   - Double-click a procedure from the category. If the procedure code is not found, click the **Lookup CPT** button.
   - Complete the procedure line.
   - When finished, click the **Save** button.
10. Click the **Save** button.

Create an Encounter Template: Procedure

This section will show how to add procedure codes to a template to capture charges performed by procedures done in the office.

1. Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click the **Add** button.
3. Navigate to the **Procedures** tab.
4. Select the **Category** where the code is that you wish to update. If you cannot find the code in the category, click the **Lookup CPT code**.
5. Double-click the Procedure to select it.
6. Edit the procedure line by clicking in the columns to edit.
   a. *(Optional)* **Mod:** Select a Procedure Modifier from the drop-down menu.
   b. *(Optional)* **Procedure Note**: Click into the field and enter the note for the procedure.
   c. **Units**: Type in a number or click the up and down arrows.
   d. **DX1-DX4**: Select the Diagnosis Codes drop-down menus. The list of diagnosis codes to choose from is entered on the Encounter Note tab of the Template.
   e. *(Optional)* **EPSDT**: Select Y or N from the drop-down.
   f. *(Optional)* **EP Refer:** Select an option from the drop-down.
   g. Click the **Save** button.
7. Click the **Save** button.

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Update Well Visit Templates

Update a Well Visit Template

1. Navigate to the Well Visit Template Editor: **Clinical tab > Well Visit Templates**.
2. Select a template and click the **Edit** button or double-click to open it.
3. At the top of the window, you can edit the below information.
   - **Template Name**: Name given to a template.
   - **Min age (months)**: The minimum age a child must be to receive a prompt for use.

- *(Optional)* **Appt type**: Selection of a default appointment type.
- **Location**: View the template at a specific location; leave it blank to allow all locations.
- **Archive**: Selecting the checkbox will archive the template.
- *(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. To edit other parts of the Well Visit template, navigate to the tabs.
   - **Well Visit Notes**: These fields have been pre-filled according to the Bright Futures templates. Edit as needed.
   - **Detailed ROS**: This shows the questions that are currently viewable on the Well Visit Template.
     a. Click on the **Show all groups** checkbox to view all available questions.
     b. Expand the section you would like to edit by clicking the plus sign next to the section.
     c. Add sections by clicking on the N/A box until it reads Pert.
     d. Remove sections by clicking on the Pert box until it reads N/A.
   - **School Exam**: Information found in the School Exam will print on forms, such as a school or camp form.
   - **Detailed Exam**: This shows the items that are currently viewable on the Well Visit Template.
     a. Click on the **Show all groups** checkbox to view all available groups.
     b. Expand the section you would like to edit by clicking the plus sign next to the group.
     c. Add questions by clicking the N/A in the NL/ABNL column to set a value of NL, ABNL, or Pert.
     d. Remove questions by clicking on the value in the NL/ABNL column until it reads N/A.
   - **Orders/Workflow**: In this tab, you can navigate to the following tabs and edit Medications, Diagnostic Tests, Immunizations, Resources, Surveys, Followup, Other tasks.
     a. Add an order to the listed tabs by clicking the **Add** button.
     b. Click the drop-down arrow or begin typing in the field and select from the list.
     c. Click the drop-down arrow and select a **Department**.
     d. Click the drop-down arrow and select a **Usage**.
     e. Delete an item on the tab by selecting it and clicking the **Delete** button.
     f. When finished click the **Save** button.
   - *(Optional)* **Procedures**: You can add procedure codes to a template to capture charges performed by procedures done in the office.
     a. Select a procedure category from the **Category** list.
     b. Double-click a procedure from the category. If the procedure code is not found, click the **Lookup CPT** button.
     c. Complete the procedure line.
     d. When finished, click the **Save** button.
5. Click the **Save** button.

Archive Well Visit Templates

1. Navigate to Well Visit Template Editor: **Clinical tab > Well Visit Templates**.
2. Open the template you want to update by double-clicking on the template name or by selecting the template and clicking the **Edit** button.
3. Select the **Archived** checkbox, and click the **Save** button.

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