

#### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

# Add a Symptom Template

Last Modified on 03/24/2020 12:47 pm EDT

Version 14.19

### Path: Clinical tab > Encounter Templates

# Overview

You will have an understanding of the content of a typical symptoms template. You will be instructed on building a symptom template from scratch. Your understanding of symptom templates and their uses will ensure that the symptom templates reflect the workflow of the practice.

- 1. Click the **Clinical** tab and select **Encounter Templates**. The Encounter Template Editor displays.
- 2. Click the plus to expand **System : Symptom** group.

**Tip:** It is recommended you expand the System : Symptom group to ensure you do not duplicate a template.

sarch:	Show ar	chived <u>A</u> dd	Edit Delete Impo	rt Export
	A DX DX			
Template Name	a DX DX	Description	Chief Complaint	By
System : Infectious Diseases     System : Lab F/U				
System : Musculoskeletal				
System : Neurologic				
System : Nursing Visits				
System : Office Medications				
System : Plan				
System : Procedures				
System : Psychiatric				
System : Respiratory				
System : Skin				
System : Symptoms				
Abdominal Pain (<2 weeks)		abdo	minal pain (<2 weeks duration	
Abdominal Pain (2+ weeks)		abdo	ominal pain (2+ weeks)	
ADD f/u		ADD	f/u visit	
ADD/ADHD symptom f/u		F/U v	visit for ADD/ADHD:	
ADD: initial evaluation		Initia	ADD evaluation	
Allergic reaction		aller	gic reaction	
Blood in urine		bloo	d in urine	
Chest pain		chest	t pain	
Cold symptoms		cold	symptoms	
Cough		coug	ph	
Diarrhea		diarr	hea	
Dizziness		dizzi	ness	
Ear pain		ear p	ain	
		pain	in eye(s)	
Eye pain		fall		
Eye pain Fall		Tall		
			/fatigued	

- 3. Click the Add button.
- 4. Add the template using the properties table definitions below.





Property	Description
Template	Name given to a template. Should be named for ease of searching.
Category	Method of organizing like templates. All templates added in this section will be located in the Symptom category.
Author	Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.
Appt Type	Selection of a default appointment type. Not a requirement to save the template.
Visibility	Ability to restrict who can view the selected template. All symptom templates are preset to be visible to any staff member.
Location	Assignment can be made to view templates by location. If there are multiple locations leave this field blank.
Finalize Status	Selection set to who may finalize. Most templates will be set to Providers only.
Default place of service	The Default place of service is not a required field. 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 the Encounter Note tab if not already selected.
- 6. Enter a complaint in the **CC** field or use the Phrase Construction button **()** to insert phrases.
- 7. Enter the history of the complaint in the**HPI** field or click the Phrase Construction button **I** to insert phrases.
- 8. Click the **Detailed ROS** tab. Set the ROS Questions/Symptoms.





D	etailed ROS	Freeform ROS			
	Rpt / Deny	Question / Symptom	Comment	<b>\$</b>	
6	E Constitu	tional			
-	E Eyes				
Ľ	ENT				
F	Respirat	ory			
	N/A	Comments:			
	Pert	daytime cough			
	Pert	nighttime cough disturbing sleep			
	Reports	wheezing or difficulty breathing			
	Pert	chest pain		<b></b>	
	N/A	dyspnea on exertion	First Click = Reports		
	N/A	need to use asthma rescue meds more than twice a week	Second Click = Denles		
	N/A	nighttime cough disturbing sleep more than twice a week	Third Click = Pert		
	N/A	ER/doctor visits more than twice a month due to asthma	Fourth Click = back to N/A		
	N/A	cigarette/secondhand smoke exposure			
	N/A	exposure to renovation dust			
	N/A	exposure to mold, birds, animals			
	N/A	exposure to pollens			
]	N/A	exposure to industrial solvents, fumes,			

Setting	Description
Pert	Relevant symptom/question to display when template is opened.
Reports	Positive for the symptom/question
Denies	Denies the symptom/question
N/A	Not applicable for the template. Removes from the group list.

Note: Select the checkbox Show all groups to see all Review of System groups .

Optional tabs, Orders/Workflow and Procedures. Click here to navigate to additional information on completing these tabs.

9. Click the **Save** button.

Version 14.10

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#### Utilities > Manage Clinical Features > Encounter Template Editor

## Overview

You will have an understanding of the content of a typical symptoms template. You will be





instructed on building a symptom template from scratch. Your understanding of symptom templates and their uses will ensure that the symptom templates reflect the workflow of the practice.

- 1. Click **Utilities** in the main menu.
- 2. Select Manage Clinical Features.
- 3. Select Encounter Template Editor. The template list displays.
- 4. Click the **plus** to expand System: Symptom group.

	Template Name	A DX	DX Description	Chief Complaint	By
	System :				
+ 5	System : Cardiovascular				
• •	System : Constitutional				
+ 5	System : Ears, Nose, Mouth, Throat				
+ :	System : Endocrine				
+ 5	System : Eyes				
• •	System : Followup				
+ 5	System : Gastrointestinal				
+ :	System : Genitourinary				
+ 5	System : Hematologic/Lymphatic/Immunologic				
+ 5	System : Infectious Diseases				
+ 5	System : Lab F/U				
+ 5	System : Musculoskeletal				
+ 5	System : Neurologic				
•	System : Nursing Visits				
+ 5	System : Respiratory				
+ 5	System : Skin				
- 5	System : Symptoms				
4	Abdominal Pain (<2 weeks)			abdominal pain (<2 weeks duration)	
1	Abdominal Pain (2+ weeks)			abdominal pain (2+ weeks)	
1	ADD f/u			ADD f/u visit	
1	ADD: initial evaluation			Initial ADD evaluation	
4	Asthma consult			Asthma consult	
0	Chest Pain			chest pain	
	> H (2)				

It is not required to expand the group but is best practice to make sure you do not duplicate a template.

- 5. Click the Create a new template button
- 6. Add the template properties using the table definitions below.

🖛 Tem;	plate List		1	00		
Template:	Wheezing	1	Appt type:		📉	Finalize status:
Category:	Symptoms	v	Visibility:	Any staff member	~	<ul> <li>Providers only</li> <li>Any clinician</li> </ul>
Author:	0 📉	10	Location:	Primary Location	~	None (archived)

Property	Description
Template	Name given to a template. Should be named for ease of searching.
Category	Method of organizing like templates. All templates added in this section will be located in the Symptom category.
Author	Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.
Appt Type	Selection of a default appointment type. Not a requirement to save the template.



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Yisibility Property	Ability to restrict who can view the selected template. All symptom templates <b>Description</b> are preset to be visible to any staff member.
Location	Assignment can be made to view templates by location. If there are multiple locations leave this field blank.
Finalize Status	Selection set to who may finalize. Most templates will be set to Providers only.

- 7. Click the Encounter Note tab if not already selected.
- 8. Enter a complaint in the CC field or use the Phrase Construction button **(See Second Secon**
- Enter the history of the complaint in the HPI field or click the Phrase Construction button
   to insert phrases.
- 10. Click the **Detailed ROS** tab. Set the ROS Questions/Symptoms.

De	tailed ROS	Freeform ROS			
F	Rpt / Deny	Question / Symptom	Comment	6	1
ŧ	Constitu	tional			
-	Eyes				
	ENT				
	Respirat	ory			
	N/A	Comments:			
	Pert	daytime cough			
	Pert	nighttime cough disturbing sleep			
	Reports	wheezing or difficulty breathing			
	Pert	chest pain		<b></b>	
	N/A	dyspnea on exertion	First Click = Reports		
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	N/A	ER/doctor visits more than twice a month due to asthma	Fourth Click = back to N/A		
	N/A	cigarette/secondhand smoke exposure			
	N/A	exposure to renovation dust			
	N/A	exposure to mold, birds, animals			
	N/A	exposure to pollens			
1	N/A	exposure to industrial solvents, fumes,			

Setting	Description	
Pert	Relevant symptom/question to display when template is opened.	
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• Optional tabs, Orders/Workflow and Procedures. Click**here** to navigate to additional information on completing these tabs.

11. Click the Save changes to template button 🥝 .

