

Important Content Update Message

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

Save a Template When Charting

Last Modified on 10/15/2020 2:39 pm EDT

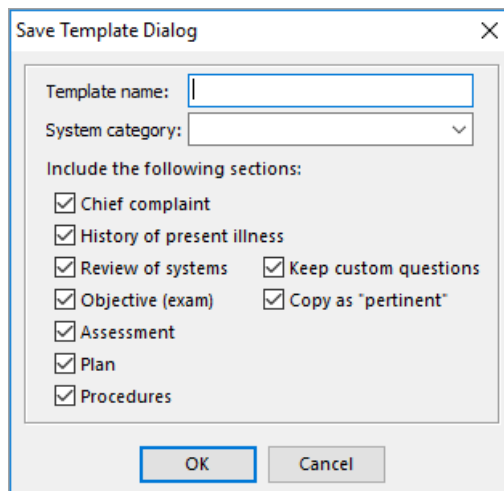
Version 14.19

Overview

While Visit Templates are typically created prior to documenting a Visit, they can also be created on-the-fly while documenting a Visit. This functionality is helpful because it builds your Template library, and saves time when you are charting another Visit the same way. Templates created during the charting of a Visit may be edited later by navigating to the Encounter or Well Visit Template Editor, but are Author-protected. This means that the user who created the Template is the only user who can make edits. All Providers, however, can use the Template.

Save As Template: Encounter

1. From within the Encounter but before finalizing, click **Summary** if you are not already there.
2. After reviewing the Note content, click on the **Save as Template** button located toward the bottom of the window.
3. Complete the information in the Save Template Dialog window:

The image shows a 'Save Template Dialog' window. It has a title bar with a close button (X). Inside, there is a 'Template name:' text box, a 'System category:' dropdown menu, and a section titled 'Include the following sections:'. This section contains several checkboxes, all of which are checked: 'Chief complaint', 'History of present illness', 'Review of systems', 'Objective (exam)', 'Assessment', 'Plan', 'Procedures', 'Keep custom questions', and 'Copy as "pertinent"'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

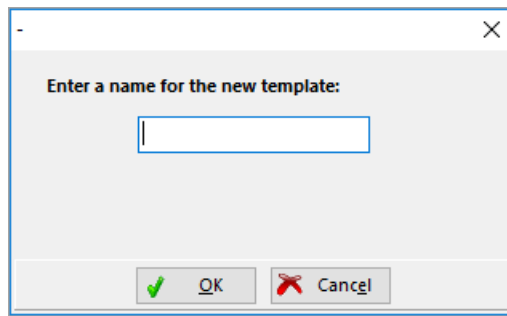
- **Template Name:** Enter the **Template name**.
- **System Category:** Select the **System Category** for the template from the drop-down menu.
- **Sections to include:** Select or deselect the sections of the Encounter Note to include in the template. By default, all boxes will be checked. To exclude a section, click on the checkbox to clear it.
- **Keep custom questions:** Select to include or deselect to exclude the Custom Questions.
- **Copy as "pertinent":** Select this checkbox to save and revert all to "Pert". To preserve your selections, deselect the checkbox.

4. Click **OK** to save the template.

Save As Template: Well Visit

1. From within the Well Visit but before finalizing, click **Summary** if you are not already there.
2. After reviewing the Note content, click on the **Save as Template** button located toward the bottom of the window.

3. In the dialog window, enter a unique **name** for the new template, and click **OK**.



4. Click **OK** in the Information window.

