

Encounter Template Editor

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Version 20.13



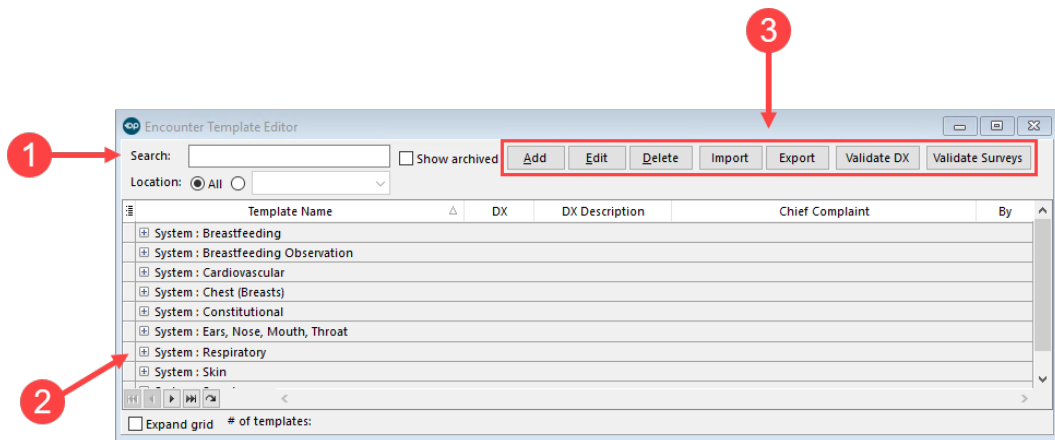
This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Encounter Template Editor

Path: Clinical tab > Encounter Templates button

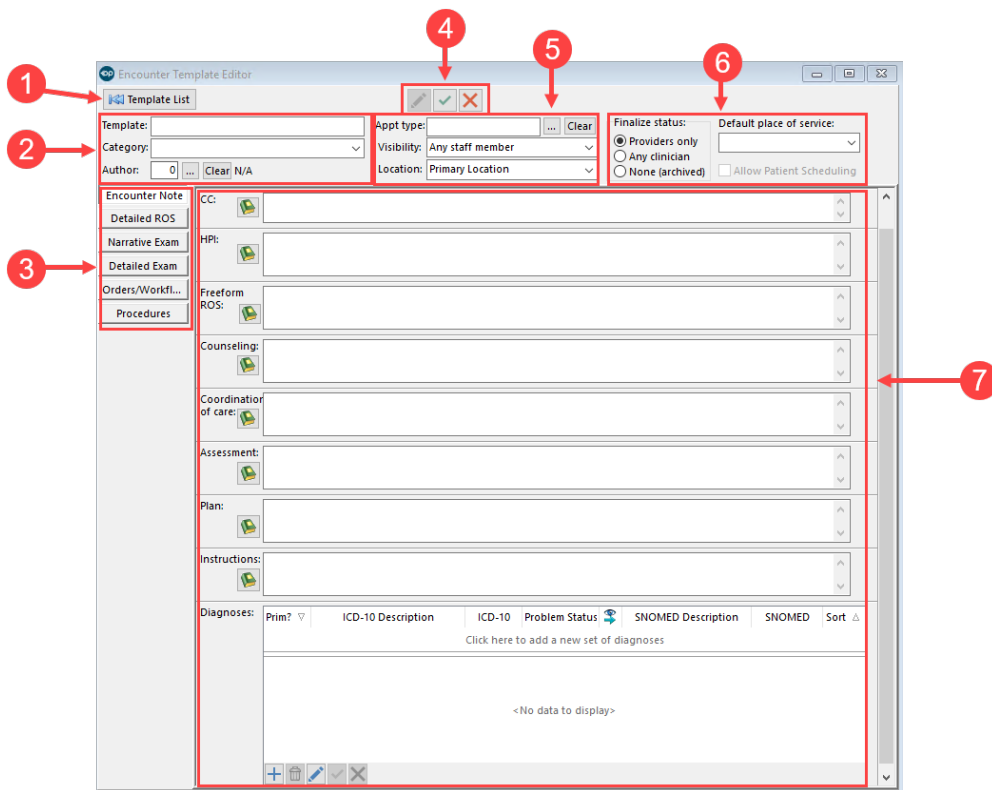
Templates are pre-written notes you can use in an encounter to document common pediatric diagnoses. Templates include detailed descriptions for the usual pertinent positive and negative findings of a wide variety of illnesses with a standard assessment, plan and ICD-10 coding. Included with your installation of Office Practicum are Pediatric specific templates. In the Encounter Template editor, you can add encounter templates, edit encounter templates, import or export templates, and set default exam templates. Additionally, you can look for invalid CHADIS surveys linked to templates. More information on validating CHADIS surveys can be found [here](#). The Template Editor contains two windows:

- The Encounter Template Editor Template List
- The Encounter Template Editor



Encounter Template Editor Template List Map

Number	Section	Description
1	Search Criteria	Search functionality helps to limit the template list. <ul style="list-style-type: none"> • The Search bar looks for specific templates. • The Location field helps narrow the template list to the location assigned to that template.
2	Template List Grid	The template grid lists the OP encounter templates. The encounter templates are categorized by systems.
3	Function Buttons	The function buttons add a template, edit a template, delete a template, import/export templates, validate diagnoses, and validate CHADIS surveys used in templates.



Encounter Template Editor Map

Number	Section	Description
1	Template List button	The Template List button returns the Encounter Template Editor to the Template List.
2	Template, Category, and Author	<ul style="list-style-type: none"> • Template: Assigns a name to the template. • Category: Method of organizing like templates. • <i>(Optional)</i> Author: Assignment of a template to a specific user. Templates assigned to an author may only be edited by that user.
3	Tabs	<ul style="list-style-type: none"> • The Encounter Note tab creates Encounter Note field entries. This includes CC, HPI, ROS, counseling, coordination of care, assessment, plan, instructions, and diagnoses. • The Details ROS tab contains the ROS Questions/Symptoms for the Encounter Note • The Narrative Exam tab provides a narrative of the exam. • The Detailed Exam tab documents the findings of the encounter. • The Orders/Workflow tab sets up orders and workflow tasks as they relate to the practice. • The Procedures tab adds procedure codes to a template design in order to capture charges performed by an office procedure.
4	Function buttons	The function buttons edit the template, save changes to the template, and cancel changes to the template.
5	Appt type, Visibility, and Location	<ul style="list-style-type: none"> • <i>(Optional)</i> Appt Type: Selection of a default appointment type. • Visibility: Ability to restrict who can view the selected template. • Location: View the template at a specific location, leave it blank to allow all locations to view the template.

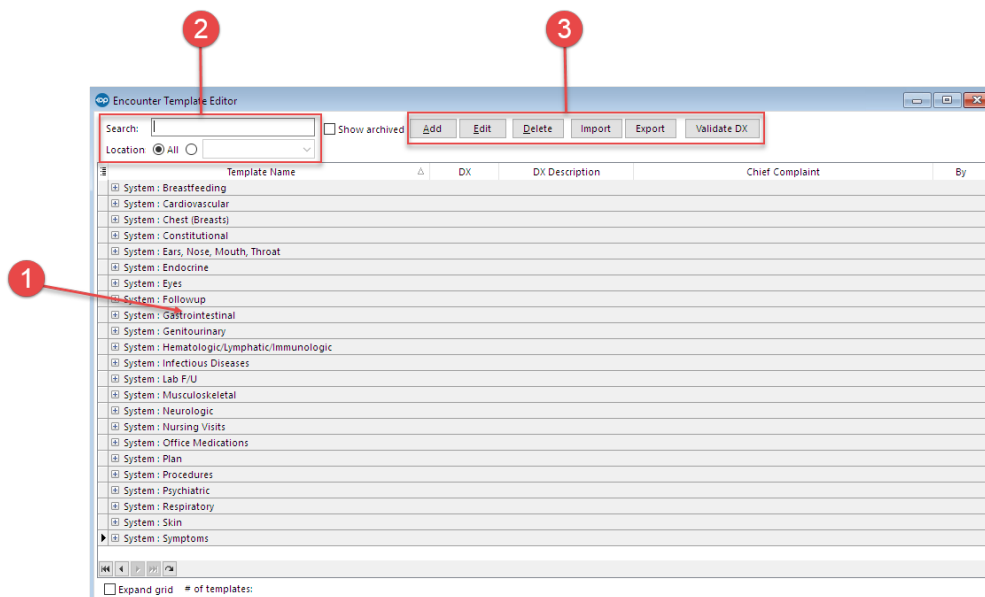
6	Finalize status, Default place of service, and Allow patient scheduling	<ul style="list-style-type: none"> • Finalize status: Selection of who may finalize the template. Most templates will be set to Providers only. • <i>(Optional)</i> Default place of service This field can be used with templates that are non-office such as Telehealth to automatically populate the Place of service on the Visit Information tab of an encounter note. • Allow for patient scheduling: Select this checkbox to allow live scheduling. Click here to learn more.
7	Template Entries	The Template Entries field displays the fields for the selected Encounter Template tab.

Version 20.12

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